

LOYALTY | ACADEMY

EDUCATION BY LOYALTY MARKETERS, FOR LOYALTY MARKETERS

The Loyalty Academy presents
2018 Annual Certification Workshop
October 16-19, 2018

A professional marketing education program leading to the distinction of being named a Certified Loyalty Marketing Professional™ (CLMP).

The Riverside Hotel
620 East Las Olas Boulevard
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Course Facilitators
Mike Capizzi, CLMP
Dean of the Loyalty Academy
Founding Partner
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Sr. Faculty – The Loyalty Academy
Partner
Customer Strategy Network
CANADA

Workshop Overview

The **Workshop** is an interactive, 3 ½ day training program designed to provide an in-depth assessment of the strategic principles and best practices which govern loyalty marketing programs. The workshop will deliver this assessment from the perspective of both Consumer and B2B customer relationships.

Through a combination of lecture, discussion, case studies and the use of specific loyalty and retention evaluation tools, this workshop seeks to expand the participant's knowledge and understanding of the available techniques used around the world by loyalty and relationship marketing professionals. The workshop is intended for senior level marketing and loyalty program decision-makers in both Consumer and B2B markets, including those agencies and service providers who support client loyalty programs.

Upon conclusion of the workshop and successful completion of the requirements associated with the Case Study analysis, each participant will earn the distinction as a Certified Loyalty Marketing Professional (CLMP)!

Sponsor: The Loyalty Academy, Boca Raton, FL, USA www.loyaltyacademy.org



Media Sponsor: The Wise Marketer Group www.thewisemarketer.com



Program Schedule - Day 1 (Tuesday)

8:30 Registration and breakfast
9:00 Morning session
10:40 – 11:00 Break
12:30 Lunch break
1:30 Afternoon session
3:00 – 3:20 Break
5:00 Session concludes and day 1 cocktail hour

Program Schedule Days 2 & 3 (Wednesday & Thursday)

8:30 Breakfast
9:00 Morning session
10:40 – 11:00 Break
12:30 Lunch break
1:30 Afternoon session
3:00 – 3:20 Break
5:00 Session concludes

Program Schedule Day 4 (Friday)

8:30 Case Study Final review and examination
11:30 CLMP Award Ceremony
12:00 Workshop concludes

Agenda

Day 1 – Strategic Foundations

Principles of Loyalty Marketing (9 – 11 am with break)

- Three pillars of truth
- Is loyalty right for me? For my customers? Why?
- Identification, retention and increased yield objectives
- The psychology of rewards
- Exercise - Introduction to case study

Best Practices in Program Design PART I (11 – 1230 pm)

- Structural models
- Segmentation of the customer base
- Defining the value proposition
- Hard and soft benefits

Best Practices in Program Design PART II (130 - 230 pm)

- Flexible funding rates
- A spectrum of rewards
- Engagement strategies
- How to design an exit strategy
- Exercise – Design considerations for the case study

Principles of Communications (230 – 4pm PM with break)

- The relationship chain
- Communication Foundations
- Dialogue and Engagement
- The social and mobile loyalty landscape
- Exercise – communications plans for the case study

All attendees are invited to an on-site cocktail party with free beer & wine plus hors d'vres hosted by our sponsors. Good networking opportunity!

Day 2 – Turning Strategy into Action

Analytical Foundations (9am – 11am with break)

- Why customer data often aligns with loyalty readiness
- Competitive intelligence and loyalty scans
- Practical techniques for segmentation
- Value, attrition and potential modeling
- Measurement plans, testing methods and program refreshment
- Exercise – Data definitions from the case study

Operational and Technical Issues (11 – 1230pm)

- Does my strategy drive operations and technology?
- Technical requirements and alternatives
- The rules engine
- How to evaluate “total cost of ownership”
- Operational considerations
- Exercise – How would you run the case study program?

Financial Planning and Return on Investment (130pm – 4pm with break)

- The finance of loyalty marketing
- Lift vs. retention – benchmarks for analysis
- Financial analysis before design – A how to approach using case study materials
- ROI Modeling – A how to approach using case study materials and tools

Open Discussion – Case Study (4 – 5pm)

Day 3 – Practical Tools and Tips

Rewards Strategies (9 – 11am with break)

- The concept of earning velocity
- Recognition vs. reward
- Exercise – Design the rewards catalog for the case study using evaluation tools

Loyalty Marketing Competencies (11 – 1230pm)

- 6 competencies required for loyalty success
- In source vs. outsource
- Exercise - How to evaluate yourself or your service provider using specific tools

Loyalty Marketing Across Vertical Industries (130 – 300pm)

- Consumer vs. B2B – the major differences
- The Coalition model in depth
- Financial Services
- Travel, Hotel, Hospitality, Restaurant
- Telecom and Technology
- Consumer Products and Services
- Retail and eCommerce/mCommerce
- Other vertical markets

Trends and Future Predictions (3pm – 4pm with break)

- What’s happening around the globe and why?

Open Discussion – Case Study (4 – 5pm)

Day 4 - The case study Wrap-up (830a - Noon)

- Each participant will be called upon to discuss their approach to the case
- The audience will provide feedback while the Loyalty Academy Faculty and Board of Regents members evaluate the participants approach. This is a “final examination” – be prepared!
- The instructors will then reveal what really happened
- Each participant can compare their strategic design to the actual outcome
- A brief graduation ceremony will conclude the workshop!

About the Case Study

A case study of a real-world loyalty design problem is given to all registered participants *prior* to the start of the workshop. Advance review is requested.

Throughout each instructional module of the workshop, participants are asked to discuss and outline their design and strategies for the section being covered. By the end of Day 3, participants will have a high-level design outline for the complete program to *compare to the real-world outcome deployed the client!*

BONUS

Each participant will receive a file folder with practical tools, which can be used to assist in the design of a loyalty program. Included are tools for:

- ROI modeling
- Benefit ideation and evaluation
- Evaluating loyalty competence
- Access to the B2B Loyalty Guide

Certification

The Loyalty Academy offers a full professional education program for marketers that culminates in the distinction of becoming a [Certified Loyalty Marketing Professional](#) (CLMP™) upon successful completion of the requirements. Certification bestows upon the recipient the right to use the letters CLMP next to the individual’s name, the recipient inclusion in the annual alumni listing, and a framed diploma. Certification requires the completion of ***15 units of study*** from the CLMP coursework over a period not to exceed 3 years OR the successful completion of the coursework and case study requirements at the ***Annual Certification Workshop***.

The CLMP distinction represents the highest level of professionalism in the loyalty marketing industry. The certification stays with the individual for the balance of their careers, regardless of their personal employment status. As of Spring 2018 there are 46 loyalty professionals in 16 different countries around the world who carry this prestigious accreditation. There are approximately 50 other professionals who are in the process of earning their CLMP.

Benefits

Capitalize on the expertise of renowned authorities in the field of loyalty marketing to gain an in-depth understanding of these vital issues:

- Evaluate: if loyalty marketing is the *right* thing to do for your customers and your company
- Compare: the structural models and strategic designs prevalent in the loyalty industry to determine which approach is best for you and why
- Learn: the practical and proven approaches to customer segmentation that drive best practices in loyalty design
- Understand: the relevant factors which help assess the strengths and weaknesses of loyalty service providers and your internal marketing support teams
- Align: the operational, technical, communications and rewards components required in all loyalty programs with the strategic and analytical foundation of the program design
- Develop: a suite of best practices and associated tools to help you sort through the many choices you must consider building a new program or enhance an existing program.
- Master: the skills required to expertly model the probable financial return on investment associated with any loyalty initiative
- Uncover: the future trends, which will most likely impact the loyalty industry in the years ahead.
- Start down the path to professional certification!

Who should attend?

This program is uniquely designed and will be of benefit to Director, Vice Presidents, Senior Managers and Managers of:

- Marketing
- Customer Retention & Loyalty
- CRM
- Customer Relations/Satisfaction/Market Research
- Relationship Marketing
- Strategic Planning
- Database Marketing
- Business Development
- Agency Client Executives and Account Managers

In the following industries:

- Retail
- Financial Services
- Consumer products
- Restaurant/Hospitality/Entertainment/Gaming
- Travel
- B2B

Whether you have an existing program and are looking to evaluate or refresh its design, or you are thinking about a program for the first time, this is the one workshop which can help you the most!

[View detailed credentials about your workshop facilitators here.](#)

[View details about the Loyalty Academy here.](#)

Testimonials

“If you are involved with the loyalty marketing industry or are looking to adopt a loyalty solution for your best customers, this is the most important workshop you’ll ever attend.”

VP Marketing, Financial Services organization

“Mike is a fantastic instructor who has conducted loyalty marketing workshops all over the world. Margaret offers the dual perspective of client and service provider having worked many years on both sides of the aisle. Their knowledge of the industry and the strategic principles of loyalty design come through easily - with enthusiasm and passion for the industry.”

Director of Marketing, B2B Services and Supplies Company

“The practical, how-to approach of this workshop, including the tools and techniques I need to do my job, were much appreciated.”

Loyalty Marketing Manager, Retail Industry

“Mike and Margaret know more about the strategic principles and practices of loyalty marketing than anybody in the industry.”

President & CEO, Marketing Services Agency

Registration Rates

\$ 2,000 Members

\$ 3,250 Non-Members

For full three-day session including breakfast and lunch all 3 days and cocktail hour after the first day session. Breakfast ONLY also included on day 4.

Also includes lecture materials and bonus files with loyalty program design tools

Group rates are available for companies who register 3 or more individuals.

Special rates for students are available.

[Go here to register for the 2018 Workshop](#)