



**2022 Fourth Annual US Certification Workshop**

**Wednesday November 2- Friday November 4, 2022  
Fort Lauderdale, Florida, USA**

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



**Sponsors**



# OVERVIEW

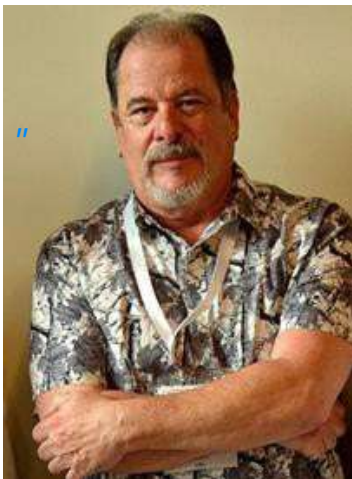
The Loyalty Academy in collaboration with the Wise Marketer presents the  
4<sup>th</sup> Annual US Certification Workshop

## Location

### Riverside Hotel

620 East Las Olas Blvd  
Fort Lauderdale, FL 33301  
+1 954-467.0671

**Book directly** to receive a discounted rate at  
The Riverside (subject to availability).



**LOYALTY | ACADEMY**  
EDUCATION BY LOYALTY MARKETERS, FOR LOYALTY MARKETERS

## Course Facilitator

Mike Capizzi, CLMP  
Dean of the Loyalty Academy

## Registration Rates:

Rate \$2,000 USD

Special rates available from our partners and sponsors. Group rates are available for companies who register three or more delegates. [Contact us for details.](#)

- Registration includes breakfast, lunch and refreshments each day plus a networking reception on Wednesday night
- Registration also includes all lecture materials and bonus files with loyalty program design tools.

## Workshop Overview

The **Workshop** is an interactive, 2.5-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 Final Exam, each participant will earn the distinction as a Certified Loyalty Marketing Professional™.

### 2.5 Day Workshop Schedule

	<b>Wednesday November 2nd</b>
<b>08.00</b>	<b>Registration @ The Riverside Hotel</b>
<b>08.30</b>	<b>Morning Session</b>
<b>10.45 - 11</b>	<b>Coffee break</b>
<b>11 – 12.30</b>	<b>Mid-day Session</b>
<b>12.30 – 1.30</b>	<b>Lunch</b>
<b>1.30 – 5.00</b>	<b>Afternoon Session</b>
<b>6.00</b>	<b>Networking Reception &amp; Hors d'Heurves @ The Boathouse restaurant (on site)</b>
	<b>Thursday November 3rd</b>
<b>8.30 – 12.30</b>	<b>Morning Session</b>
<b>12.30 -1.30</b>	<b>Lunch</b>
<b>1.30 – 5.00</b>	<b>Afternoon Session</b>
	<b>Friday November 4th</b>
<b>8.30 – 12.30</b>	<b>Morning Session (no lunch)</b>
<b>1.00</b>	<b>Workshop Concludes</b>

## Course Contents Overview

### Strategic Foundations

#### Principles of Loyalty Marketing

- Overview
- Developing customer relationships
- Is loyalty right for me? For my customers? Why?
- Strong components of a Loyalty Program
- Strategic pillars of Loyalty Marketing
- Loyalty programs today
- Program and financial objectives

Exercise - Introduction to case study

#### Fundamental Design Principles

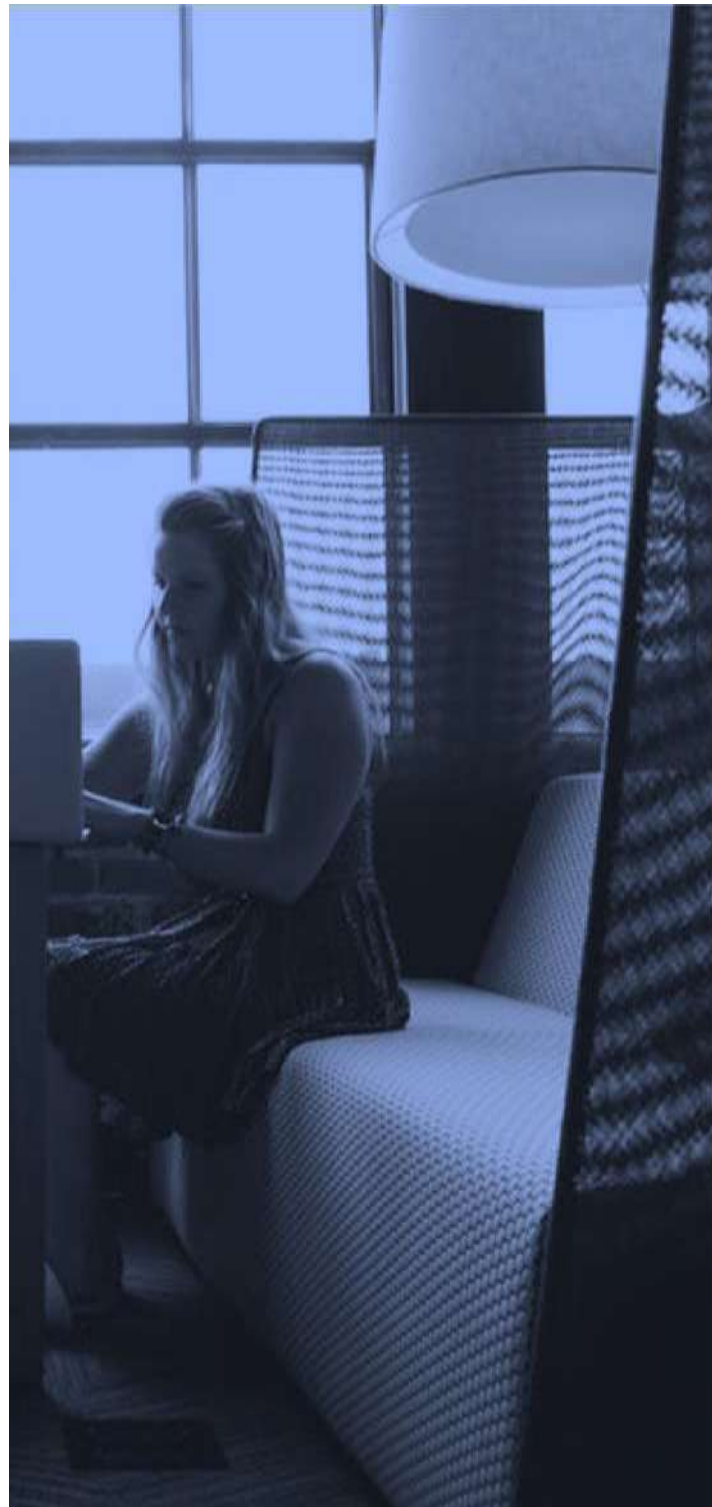
- Fundamentals
- Hard and soft benefits and the psychology of rewards
- Segmentation of the customer base & bonusing
- Alternative funding
- Member dialog and engagement
- Measure results and evolve or exit

#### Best Practices in Program Design

- Behavioral objectives, models, and value propositions and customer segmentation
- Reward spectrum and flexible funding rates
- Dialog and engagement strategies
- Member care and trends
- Exercise – Design considerations for the case study

#### Principles of Communications

- Marketing versus Loyalty communication
- Communication Foundations
- Dialog and listening
- Branding, tactics, tips and examples
- Exercise – communications plan for the case study



# Course contents continued

## Turning Strategy into Action

### Analytical Foundations

- Data sources and measuring key metrics
- Gathering member, transactions and operational information
- Why customer data often aligns with loyalty readiness
- Measurement plans, testing methods and program refreshment
- Competitive intelligence, loyalty scans and reporting
- Value, attrition and potential modeling
- Practical techniques for segmentation
- Exercise – Data definitions from the case study

### Operational and Technical Issues

- Does my strategy drive operations and technology?
- Implementation considerations
- Operational considerations
- Technical requirements and alternatives
- Effective use of Technology for members and administrators
- Social and Mobile Landscape
- Loyalty platform options
- Exercise – How would you run the case study program?

## Practical Tools and Tips

### Rewards Strategies

- Consumer perception and behaviors
- The concept of earning velocity
- Recognition vs. reward
- Reward considerations
- Exercise – Design the rewards catalog for the case study using evaluation tools

### Financial Planning and Return on Investment

- Financial analysis before design – A how to approach using case study materials
- ROI Modeling – Examination of tools using case study



## Case Study and Final Examination

- Continuation of the group discussions regarding specific aspects of the case. The workshop facilitators from the Loyalty Academy Faculty will evaluate the group's approach. Be prepared!
- The instructors will then reveal what really happened
- Each participant can compare their strategic design to the actual outcome
- Each participant will be given an online examination highlighting all workshop content. You must achieve a passing grade on this exam to be certified!
- A photo 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 by the client!*

*"if you are involved in the loyalty marketing industry or looking to adopt a loyalty solution for your best customers, this is the most important workshop you'll ever attend."* - VP Marketing - Financial Services Institution

## [Watch a Video About a Recent Workshop](#)

### Bonus

Each participant will receive three practical tools used during the session, 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 complete Loyalty Academy Vault (online library)**

### 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 diploma suitable for framing. All CLMPs are automatically made members for life in the Loyalty Academy with full access to the digital library housed in the Loyalty Academy Vault. [Click here](#) for a complete list of more than 400 alumni from 32 countries around the world.

### Benefits of Attendance

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 for you and your customers
- **Compare:** the structural models and strategic designs prevalent in the loyalty industry to determine which approach is best for you
- **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 support
- **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 impact the loyalty industry in the years ahead.

## Further Information

For additional information contact [mikec@loyaltyacademy.org](mailto:mikec@loyaltyacademy.org) or call +1 844-426-4346.

## Our Sponsors :



## Getting There:

The Riverside is in the heart of downtown Fort Lauderdale and adjacent to US route 1, close to Interstate 95, less than 10 minutes to the beach and just 20 minutes from Fort Lauderdale International Airport. Taxi and Ride Sharing services are readily available. Parking on site is also available (fee).

[Reservations](#) & Further hotel information contact:

### Riverside Hotel

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