INDUSTRY GUIDE · MANUFACTURING

# How manufacturers grow channel sales with a phased loyalty program for retailers and end users

A practical guide to driving invoice uploads, product registrations, repeat engagement, and program ROI across retailers, contractors, and end users.

**4**
phases, each with a gate to meet before the next

**28**
initiatives across retailers and end users

**3**
audiences: retailers, contractors, and end users

**6**
business objectives every initiative traces back to

01 · WHY PROGRAMS STALL

## Why manufacturer loyalty programs stall after launch

Most manufacturer loyalty programs stall after launch because enrollment is treated as the finish line rather than the first step. A retailer who signs up but never uploads an invoice, or a buyer who registers one tool and never returns, adds to the member count without adding to sales.

The problem is sharper for manufacturers because one program usually serves several audiences with different motivations:

- **Retailers and dealers** care about sell-through, scheme payouts, and how quickly their claims get approved.
- **Contractors and trade professionals** care about earning on the products they buy and use every day, plus recognition for their expertise.
- **End users** care about registering products, warranty coverage, learning how to get more from what they own, and rewards that feel worth the effort.

A single campaign calendar cannot move all three groups at once. What works is a phased plan where each stage builds a specific behavior, proves value to members before asking for more, and produces the data needed to run the next stage better.

This guide lays out that plan. It is based on a growth roadmap built for a global tools manufacturer running a combined retailer, contractor, and end-user program, with brand-specific details removed. It covers the objectives to anchor on, the initiatives to run in each phase, who should own what, the data to capture, and the KPIs that tell you when to move forward.

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02 · OBJECTIVES AND LEVERS

## Mapping business objectives to the levers that move them

Start with six business objectives, then work backward to the member behavior each one depends on. Every initiative later in this guide traces back to one of these objectives, which keeps the program tied to commercial outcomes rather than activity for its own sake.

### 1. Drive incremental retailer sales

Retailers need to upload valid invoices repeatedly and take part in schemes. The strongest levers are scheme-led sell-through incentives, upload streaks, and tiering, supported by invoice upload, scheme participation, tracking, and redemption.

**Success signals:** higher scheme participation, repeat uploads, and sales lift by scheme.

### 2. Increase product registrations

Buyers need to register products soon after purchase. A first-registration bonus, a quick scan flow, and QR-led onboarding do most of the work, supported by product registration, the digital toolbox, and WhatsApp and email prompts.

**Success signals:** registration rate, approval rate, and time to first registration.

### 3. Deepen product engagement

End users need a reason to come back after they register. Watch-and-earn, upload-and-earn, and gamified missions create that reason, using video learning, video upload, badges, and leaderboards.

**Success signals:** monthly active users, learning completion, and user-generated content participation.

### 4. Build loyalty and reduce attrition

Retailers and end users need to form repeat habits. Milestones, tiers, monthly challenges, early redemption, and reactivation campaigns build those habits, using gamification, redemption, communication, and reporting.

**Success signals:** repeat activity, first redemption, retention, and dormant member reactivation.

### 5. Build a data-driven marketing engine

The brand needs to know who is active, what is selling, and where behavior is weak. Cohort tracking, scheme reporting, product-line analysis, and geographic views provide that picture through the admin portal, reports, and communication tools.

**Success signals:** sharper segmentation, better campaign ROI, and faster decisions.

### 6. Enable education and upsell

Registration should start a post-purchase journey rather than end the interaction. Toolbox-based recommendations, service content, and accessory nudges drive that journey, using the digital toolbox, content, communication, and the rewards store.

**Success signals:** cross-sell engagement, repeat visits, and lift from content to purchase.

Two objectives deserve early attention because the rest depend on them. Invoice uploads give you verified sell-through data at the retailer level, and product registrations give you ownership data at the end-user level. Without both, segmentation, personalization, and ROI reporting in later phases have little to work with.

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03 · THE FOUR-PHASE MODEL

## How the four-phase growth model is structured

The plan runs in four phases over 12 months and beyond, and each phase has a gate that should be met before the next one starts. Moving early, for example launching tiers before claims are approved reliably, puts rewards on top of a process members do not yet trust.

**Each phase builds the behavior the next one depends on**

Phase 1
**Activation and enrollment**
Months 0 to 3
First invoice, first registration, first redemption
◇ Gate: Claims approved in SLA

Phase 2
**Engage and prove value**
Months 3 to 6
Monthly schemes, streaks, learning, gated referrals
◇ Gate: Repeat uploads stable

Phase 3
**Habit and advocacy**
Months 6 to 12
Tiers, quarterly challenges, win-back journeys
◇ Gate: Two quarters of data

Phase 4
**Optimize and personalize**
Month 12 onward
Regional schemes, upsell, ROI-led scheme pruning

The diamonds mark the gate criteria. Timelines are guides, not deadlines: a program with fast claim approval and strong field support can move through Phase 1 sooner, while a new persona launched mid-year starts again at Phase 1 for that audience.

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04 · PHASE 1: ACTIVATE

## Phase 1: Getting retailers and end users active in the first 90 days

Phase 1 runs from month 0 to month 3 and has one job: get every new member to complete a first valuable action and see a reward for it quickly. For retailers that action is a valid invoice upload. For end users it is a product registration and a first piece of learning content. The early redemption window closes the loop so members feel the value of points before they lose interest.

| Initiative | What it involves | Brand decides | Platform team builds |
|---|---|---|---|
| **QR-led retailer enrollment drive**<br>RETAILERS | Onboarding through QR codes shared by distributor reps, field staff, WhatsApp links, and in-store collateral.<br>**KPI:** Retailer enrollment rate | Mobilizes the distributor network, field teams, and store staff. Approves onboarding collateral and the launch push. | Onboarding journeys, QR entry flows, role-based sign-up, source tracking, and enrollment reporting. |
| **First invoice bonus**<br>RETAILERS | Bonus points for the first valid invoice uploaded within 7 days of joining.<br>**KPI:** First valid invoice upload rate | Approves bonus economics, invoice eligibility, and validation policy. Holds the approval team to its SLA. | First-upload bonus logic, nudges for non-uploaders, claim status messaging, and completion tracking. |
| **First product registration bonus**<br>END USERS | Bonus points for the first valid registration with invoice and serial number.<br>**KPI:** First registration rate | Approves eligible products, proof requirements, serial-number rules, and reward budget. | Registration journey, invoice and serial capture, validation states, reward crediting, and toolbox entry. |
| **Three-part welcome series**<br>BOTH | Messages covering how to earn, how to claim, which rewards matter, and how tracking works.<br>**KPI:** Welcome flow completion | Approves core messaging, the program promise, and compliance language. | Lifecycle flow across WhatsApp, in-app, and email, with persona-specific versions and completion tracking. |
| **First learning reward**<br>END USERS | Points for watching a first learning video after registering.<br>**KPI:** Learning activation rate | Approves priority content and the reward value. | Content upload, watch-and-earn journeys, reminders, reward triggers, and reporting. |
| **Live claim status tracking**<br>RETAILERS | Proactive claim status and approval updates to build trust in the program.<br>**KPI:** Claim visibility rate and drop-off reduction | Commits to a claim review SLA and gives clear rejection reasons. | In-app claim statuses, push, WhatsApp, and email updates, plus intervention flows for stuck or pending claims. |
| **Early redemption window**<br>BOTH | Entry-level rewards so members can redeem soon after joining.<br>**KPI:** First redemption rate | Approves a low-threshold reward catalog and cost guardrails. | Starter catalog, point thresholds, redemption nudges, and first-redemption reporting. |

> WHAT MAKES OR BREAKS THIS PHASE
> Claim approval speed. If a retailer uploads an invoice and waits two weeks with no status update, the program loses credibility before it has a chance to prove itself. Agree on a review SLA and rejection-reason standards before the enrollment push starts.

**Ready to move to Phase 2 when:** a clear majority of enrolled retailers have at least one approved invoice, first registrations are being approved within the agreed SLA, and first redemptions are happening without manual intervention.

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05 · PHASE 2: REPEAT

## Phase 2: Building repeat behavior and proving program value in months 3 to 6

Phase 2 turns one-time actions into monthly ones. Retailers get short-cycle schemes and streak rewards that reward consistency, while end users get missions, learning series, and personalized messages tied to the products they own. Referrals open here, but only to members who have already completed a valid claim or registration, which keeps referral quality high.

| Initiative | What it involves | Brand decides | Platform team builds |
|---|---|---|---|
| **Monthly sell-through schemes**<br>RETAILERS | Short-cycle schemes by product line or region with clearly visible rewards.<br>**KPI:** Monthly scheme participation | Selects priority SKUs, regions, and incentive thresholds. Funds the scheme and aligns field teams. | Scheme logic, audience segmentation, launch communication, dashboard monitoring, and region-wise reporting. |
| **Upload streak rewards**<br>RETAILERS | Bonus for valid uploads in two or three consecutive months.<br>**KPI:** Repeat upload rate | Approves streak criteria and the reward ladder. | Streak engine, progress counters, reminders, and nudges for members at risk of breaking a streak. |
| **Product trial missions**<br>END USERS | Points for a first photo or video showing the product in real use.<br>**KPI:** User-generated content participation rate | Defines acceptable proof of use and brand-safe content standards. | Content missions, submission templates, moderation flow, reward triggers, and quality tracking. |
| **Structured learning missions**<br>END USERS | Watch a demo, answer a short quiz, and earn a badge.<br>**KPI:** Learning completion rate | Approves content themes, quiz logic, and badge structure. | Episodic learning journeys, completion rules, badge unlocks, reminders, and reports. |
| **Personalized toolbox updates**<br>END USERS | Monthly email or WhatsApp message showing owned products, tips, and relevant accessories or content.<br>**KPI:** Repeat visit rate | Approves accessory recommendations, content themes, and cross-sell relevance rules. | Toolbox-triggered journeys, messages personalized by owned products, and repeat-visit nudges. |
| **Gated referral unlock**<br>BOTH | Refer-and-earn opens only after a member completes a first valid claim or registration.<br>**KPI:** Referral conversion rate | Approves referral eligibility, reward structure, and fraud policy. | Unlock logic, referral links and QR codes, anti-abuse checks, and conversion reporting. |
| **Monthly points summary**<br>BOTH | Monthly wallet and progress statement with "you're X points away" messaging.<br>**KPI:** Reactivation and redemption intent | Approves summary format, priority data points, and calls to action. | Personalized statements covering points, status, pending approvals, and reward proximity, plus follow-up nudges. |

> WHAT MAKES OR BREAKS THIS PHASE
> Scheme design discipline. Monthly schemes work when they focus on a small number of priority SKUs or regions and the reward is easy to understand. Too many overlapping schemes dilute attention and make it hard to tell which one drove the lift.

**Ready to move to Phase 3 when:** repeat upload rates are stable across two or more scheme cycles, learning completion is trending up, and referral conversions are coming from qualified members rather than one-off sign-ups.

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06 · PHASE 3: HABIT

## Phase 3: Turning repeat activity into habit and advocacy in months 6 to 12

Phase 3 gives members a reason to stay for the long term. Tiers and quarterly challenges give retailers status to protect, mastery tracks and milestone rewards give end users a path to progress along, and stronger referral programs turn active members into a source of new, qualified joins. This is also the phase where win-back journeys for inactive members become essential.

| Initiative | What it involves | Brand decides | Platform team builds |
|---|---|---|---|
| **Retailer tier clubs**<br>RETAILERS | Bronze, Silver, and Gold progression tied to validated sales volume, consistency, and scheme participation.<br>**KPI:** Active retailer retention | Approves tier thresholds, names, benefits, and commercial logic. | Tier engine, progress tracking, tier-up communication, and retention views. |
| **Quarterly sales challenges**<br>RETAILERS | 90-day challenges by region, outlet cluster, or product line with milestone rewards.<br>**KPI:** Quarterly sales participation | Sets quarterly business priorities and approves reward slabs. | Challenge structure, progress counters, leaderboard logic, and mid-cycle nudges. |
| **Pro mastery track**<br>END USERS | Badges and milestone rewards for combining registration, learning, content, and referrals.<br>**KPI:** Monthly active end users | Approves which behaviors matter most and how mastery is recognized. | Mastery path, badge logic, progression triggers, and MAU-linked reporting. |
| **Multi-action milestone rewards**<br>END USERS | Bonus for completing a defined set: register a product, watch content, and upload proof of use.<br>**KPI:** Multi-action completion rate | Defines the bundled actions and the reward value. | Compound-event rules, completion tracking, reminders, and drop-off recovery journeys. |
| **Persona-specific referral programs**<br>BOTH | Dual-sided rewards, with larger bonuses when referred members complete a valid registration.<br>**KPI:** Referral share of new joins | Approves referral mechanics and reward differences by persona. | Separate retailer and end-user referral journeys, referral quality tracking, and optimization by completion rate. |
| **Seasonal campaigns**<br>BOTH | Festive or trade-season campaigns with bonus multipliers and themed rewards.<br>**KPI:** Seasonal participation uplift | Approves the annual seasonal calendar, commercial focus, and promotional budget. | Campaign journeys, reward accelerators, themed communication, and performance readouts. |
| **Win-back journeys**<br>BOTH | Flows for members inactive for 60 or 90 days, offering bonus earn or redemption offers.<br>**KPI:** Dormant reactivation rate | Approves dormancy windows and limits on comeback incentives. | Dormant cohort detection, reactivation campaigns, personalized comeback messages, and lift measurement. |

> WHAT MAKES OR BREAKS THIS PHASE
> Tier credibility. Tier thresholds should reflect real commercial value, and the benefits at each level should be visible enough that retailers notice what they would lose by dropping a tier. Tiers that are too easy to reach or offer little beyond a badge do not change behavior.

**Ready to move to Phase 4 when:** tier movement is steady in both directions, referrals contribute a meaningful share of new qualified members, and you have at least two quarters of scheme and cohort data to compare.

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07 · PHASE 4: OPTIMIZE

## Phase 4: Optimizing, personalizing, and improving program economics after month 12

Phase 4 uses a year of data to make the program more efficient and more relevant. Schemes are redesigned by region, journeys are personalized by the products each member owns, and redemption economics are tuned to control liability. Low-ROI schemes are retired quickly, and budget moves to the categories and cohorts that show measurable lift.

| Initiative | What it involves | Brand decides | Platform team builds |
|---|---|---|---|
| **Region-specific scheme optimization**<br>RETAILERS | Different scheme structures by region, outlet performance, and product line.<br>**KPI:** Scheme ROI by region | Decides where localization is needed based on field realities and commercial priorities. | Regional performance analysis, redesign recommendations, local scheme variants, and ROI reporting by region. |
| **Product-line journeys**<br>END USERS | Journeys personalized by owned product type, such as drilling, cutting, woodworking, or storage.<br>**KPI:** Repeat engagement by product line | Approves product-family segments and the objective for each category. | Owned-product and category-specific lifecycle journeys using toolbox and registration data. |
| **Accessory and companion upsell**<br>END USERS | Recommendations for accessories, consumables, and complementary products based on toolbox ownership.<br>**KPI:** Cross-sell engagement | Approves the upsell catalog, product pairings, and margin priorities. | Personalized recommendations, cross-sell journeys, and pairing optimization based on response. |
| **High-value cohort programs**<br>BOTH | Exclusive perks for top retailers and top professionals, such as early access, premium rewards, and VIP training or events.<br>**KPI:** High-value retention | Defines who qualifies as high value and which premium benefits are justified. | VIP cohort rules, premium reward paths, targeted communication, and retention tracking. |
| **Redemption economics tuning**<br>BOTH | Adjust catalog mix, point thresholds, burn rate, and partner-funded rewards.<br>**KPI:** Burn efficiency and liability control | Approves liability guardrails, reward mix changes, and partner economics. | Redemption behavior analysis, threshold tuning, catalog mix optimization, and burn efficiency improvements. |
| **Scheme pruning and scaling**<br>INTERNAL | Retire low-ROI schemes quickly and expand the categories and cohorts that show lift.<br>**KPI:** Program ROI | Makes stop or scale decisions based on business outcomes. | ROI dashboards, cohort analysis, scheme post-mortems, and optimization recommendations. |
| **Lifecycle automation**<br>BOTH | Service reminders, replacement-cycle nudges, anniversary campaigns, and usage-based content.<br>**KPI:** Retention and reactivation | Approves lifecycle triggers, content themes, and service or replacement logic. | Automated journeys for anniversaries, refresh cycles, care reminders, and reactivation. |

> WHAT MAKES OR BREAKS THIS PHASE
> Willingness to cut. Phase 4 only pays off if the brand acts on what the data shows, including stopping schemes that members like but that do not move sales. Set a regular review cadence where scheme performance is reviewed against ROI and a stop, change, or scale decision is recorded for each one.

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08 · BRAND VS PLATFORM

## Dividing ownership between the brand and the platform partner

The brand owns the business rules and the decisions, and the platform partner owns the engine that runs them. Making this split explicit at the start avoids the most common delay in loyalty programs, which is a configured initiative waiting weeks for an approval nobody knew they owned.

| Area | Brand owns | Platform partner owns |
|---|---|---|
| Business rules | The source of truth on products, pricing, eligibility, and what counts as a valid claim | Translating those rules into scheme logic, validation states, and reward triggers |
| Approvals and sign-off | Final approval on messaging, compliance language, reward economics, and launches | Preparing configurations, previews, and test journeys for approval |
| Budget and economics | Scheme funding, reward budgets, liability guardrails, and partner economics | Tracking burn, liability exposure, and cost per outcome, and recommending changes |
| Product priorities | Which SKUs, categories, and regions to push each cycle | Segmentation and targeting that put those priorities in front of the right members |
| Fraud policy | Rules for what is acceptable and how exceptions are handled | Duplicate and anomaly checks, risk flags, manual review queues, and enforcement logs |
| Field execution | Distributor reps, field teams, and store staff who drive enrollment and scheme awareness | QR flows, source tracking, and reporting that show which field efforts are working |
| Member journeys and campaigns | Content themes and campaign objectives | Building journeys, running campaign operations, and managing communication across channels |
| Data and insight | Acting on insights and making stop or scale decisions | Dashboards, cohort analysis, scheme post-mortems, and optimization recommendations |
| Content moderation | Standards for brand-safe user content | Moderation workflow, quality tracking, and dispute handling |

One practical step: name a single owner on the brand side for claim validation SLAs. Approval speed affects member trust more than any other operational metric, and it usually sits between sales operations and marketing with no clear owner.

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09 · DATA FOUNDATION

## Building the data foundation that makes the program measurable

Capture data at four levels: retailer, end user, shared program data, and admin operations. You do not need every field on day one, but the fields that feed Phase 1 KPIs must be clean from launch, because later segmentation and ROI analysis build on them.

### Retailer and dealer data

- **Identity and master profile:** retailer ID, outlet name, retailer type, distributor and territory mapping, region, onboarding date, registration source, consent status. Used for segmentation by geography and channel, enrollment source analysis.
- **App access:** first and last login, login frequency, session count, active or inactive status, device and app version. Used for activity tracking and dormancy detection.
- **Enrollment and onboarding:** QR, field rep, WhatsApp, and campaign source, onboarding completion. Used for measuring which field channels drive enrollment.
- **Invoice submission:** claim ID, invoice file, scan or manual mode, invoice number, purchase and upload dates, amount, SKU or category where captured. Used for sell-through visibility and scheme eligibility.
- **Validation and approval:** validation status, reviewer, approval or rejection time, rejection reason, pending duration, SLA breach flag, resubmission count. Used for claim SLA tracking and drop-off diagnosis.
- **Earn and wallet:** base and bonus points, scheme linked to earn, credit status, reversals, wallet balance, pending and expired points. Used for liability tracking and earn source mix.
- **Scheme participation:** scheme ID and type, participation status, first and repeat participation, region, product line, threshold reached. Used for scheme ROI and participation analysis.
- **Tier status:** current tier, review date, points to next tier, tier movement history. Used for tier health and retention.
- **Referral:** referral code, invites sent, qualified sign-ups, points awarded, fraud flag. Used for referral quality and conversion.
- **Redemption:** reward category and item, points spent, status, frequency, value band. Used for catalog performance and burn behavior.
- **Communication:** channel reachability, sends, opens, clicks, conversions, opt-out status. Used for channel effectiveness and message fatigue.
- **Support:** claim and redemption tickets, issue type, resolution time, escalations. Used for identifying friction in the member experience.
- **Fraud and risk:** duplicate invoice, unusual upload volume, device and geography anomalies, risk score, manual review flag. Used for fraud prevention and review prioritization.
- **Performance tags:** region, product-line participation, high-value, low-activity, dormant, and reactivation target flags. Used for cohort targeting for campaigns.

### End-user and professional data

- **Identity and profile:** user ID, region, profession or trade where captured, user segment, onboarding date, consent status. Used for persona-based segmentation.
- **Product registration:** product, category, line, and model, invoice and serial number, submission date, validation status, rejection reason. Used for registration rate, approval rate, and time to first registration.
- **Digital toolbox and ownership:** registered products, category and product-line mix, registration date per product, toolbox growth over time. Used for personalization, cross-sell, and lifecycle triggers.
- **Earn:** points from registration, video watching, content uploads, badges, referrals, and bonuses. Used for understanding which behaviors members value.
- **Content uploads and engagement:** upload type, linked product, moderation status, views, repeat uploads. Used for user-generated content quality and participation.
- **Learning consumption:** videos watched, completion status, watch duration, quiz completion, drop-off point. Used for learning effectiveness and content planning.
- **Gamification:** badges, milestones, tier, leaderboard rank, challenge completion. Used for mastery track and challenge performance.
- **Behavior and engagement:** monthly active status, visit frequency, last activity date, dormant or reactivated status. Used for MAU tracking and win-back targeting.
- **Referral, redemption, communication, support, and fraud:** same structure as retailer data, plus duplicate serial-number flags. Used for quality control and journey optimization.
- **Lifecycle tags:** product-line owner, high-engagement, high-value, dormant, first-time registrant, repeat creator, referral advocate. Used for cohort-based journeys.

### Shared program data

- **Wallet and points ledger:** current, pending, and expired balance, total earned, redeemed, and reversed, earn and burn source mix, first and last earn and redeem dates.
- **Reward store:** persona catalog version, categories viewed, rewards selected and redeemed, redemption drop-off.
- **Referral network:** referrer and referee persona, invite-to-signup and signup-to-qualification conversion, dual-sided reward issuance.
- **Campaign response:** campaign type, channel, segment, send date, exposure, click, conversion, linked activity.
- **Geography:** region, state, city, territory, distributor and market cluster, geo-tagged participation and scheme response.
- **Product and category:** product line, category, model, category-level activity, registration, and content interest.
- **Lifecycle state:** new, active, repeat active, high-value, dormant, reactivated, at-risk, tier-up eligible, redemption-ready.
- **Program health:** time to first earn, time to first redeem, repeat participation, loyalty stage, cohort assignment.

### Admin and operations data

- **Validation queue:** total, pending, approved, and rejected submissions, average review time, SLA breaches, reviewer productivity, queue aging.
- **Content moderation:** approved and rejected uploads, moderation turnaround, rejection reasons, repeat offenders.
- **Campaign configuration:** campaign owner, type, segment, region, product line, reward logic, dates, status.
- **Fraud:** rule triggered, case type, severity, repeat offender, blocked accounts, review outcome.
- **Analytics and ROI:** cohort size, activity, and redemption, plus program, campaign, scheme, region, product-line, and cohort ROI, reward cost to activity ratio, liability exposure, burn efficiency.
- **Reconciliation:** reward issue and settlement status, reversals, disputes.
- **Access and audit:** account status, role and access changes, admin actions, failed logins, audit trail for approvals and reversals.
- **Integrations:** CRM, ERP, POS, and communication tool sync status, API logs, import and export history, sync failures.
- **Localization:** language, currency, market deployment, catalog mapping, compliance region.

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10 · REPORTING VIEWS

## Reporting views that help teams make faster decisions

Build each dashboard around a decision someone has to make, not around the data that happens to be available. The views below cover the questions channel, marketing, and finance teams ask most often during the first year.

| View | Level | What it shows | What it helps you see |
|---|---|---|---|
| Invoice details by retailer | Retailer | Invoice date, value, count, and points accrued per retailer | Which retailers are active and how much sell-through each one is reporting |
| Invoice value trend across retailers | Retailer | Weekly invoice value for key retailers side by side | Where to direct field attention and which accounts are slowing down |
| Invoice count trend | Retailer | Weekly volume of invoice uploads | Whether schemes and streaks are increasing upload frequency |
| Points accrued trend | Retailer | Weekly points credited | Liability build-up and whether earn matches scheme expectations |
| City-level performance | Retailer | Sales by city or region | Where to localize schemes or add field support |
| Retailer tier distribution | Retailer | Count of retailers in each tier | Whether tier thresholds are set correctly and members are moving up |
| Consumer engagement funnel | End user | Registered, active, engaged, and repeat buyers | Where end users drop off and which phase initiatives to prioritize |
| Points issued versus redeemed | Retailer and end user | Monthly points issued and redeemed | Redemption health, burn rate, and outstanding liability |
| Points redeemed by category | Retailer and end user | Redemption volume by reward or product category | Which rewards members value and how to adjust the catalog mix |
| Mobile app KPIs | Retailer and end user | Downloads, MAU, DAU, DAU to MAU ratio, session time, 30-day retention | Overall app engagement and whether communication is bringing members back |
| Products sold versus points accrued | Retailer | Units sold and points accrued by product category | Whether reward spend is aligned with the product lines the brand wants to grow |

Review retailer views weekly during active schemes, and engagement, redemption, and app views monthly. Scheme ROI and tier distribution are best reviewed quarterly, alongside stop or scale decisions.

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11 · LAUNCH READINESS

## Launch readiness checks before scaling each phase

Close these dependencies before pushing enrollment or launching a new persona. Most of them are small on their own, but each one affects whether members trust the program in the first few weeks.

### Platform and workflow readiness

☐ Reporting dashboards show enrollment, claims, approvals, and redemptions by source and region
☐ Workflows for each persona (retailer, contractor, end user) are configured and tested, including role-based login
☐ QR codes are mapped to products and warranty records so registration and warranty activation happen in one step
☐ Custom in-app notifications are available, either self-serve or configured by the platform team as an interim step

### Operational readiness

☐ Claim review SLA is agreed and the approval team is staffed for the expected volume
☐ Standard rejection reasons are defined so members know how to fix a rejected claim
☐ Fraud rules cover duplicate invoices, duplicate serial numbers, and unusual upload patterns
☐ Starter reward catalog is live with low point thresholds and cost guardrails

### Go-to-market readiness

☐ Customer success owner and growth team are assigned and aligned on the phase plan
☐ Field teams and distributors have onboarding collateral and know how enrollment is tracked
☐ Welcome series and claim status messages are approved across WhatsApp, in-app, and email

When launching a new persona, such as contractors after retailers, run through the same list for that persona rather than assuming the existing setup carries over.

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12 · KPIS BY PHASE

## KPI reference for each phase

Track a short set of primary KPIs per phase and set targets against your own baseline once Phase 1 data is in. The table below consolidates the KPIs from every initiative in this guide.

| Phase | Retailers | End users | Program |
|---|---|---|---|
| Phase 1: Activation and enrollment (months 0 to 3) | Enrollment rate, first valid invoice upload rate, claim visibility and drop-off | First registration rate, learning activation rate | Welcome flow completion, first redemption rate |
| Phase 2: Engage and prove value (months 3 to 6) | Monthly scheme participation, repeat upload rate | User-generated content participation, learning completion rate, repeat visit rate | Referral conversion rate, redemption intent from monthly summaries |
| Phase 3: Habit and advocacy (months 6 to 12) | Active retailer retention, quarterly sales participation | Monthly active end users, multi-action completion rate | Referral share of new joins, seasonal participation uplift, dormant reactivation rate |
| Phase 4: Optimize and personalize (month 12 onward) | Scheme ROI by region | Repeat engagement by product line, cross-sell engagement | High-value retention, burn efficiency and liability control, program ROI, retention and reactivation |

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13 · THE PLATFORM

## How Loyalife supports a phased channel loyalty plan

Loyalife, Xoxoday's loyalty management platform, runs retailer, contractor, and end-user programs on one engine, so the brand manages schemes, claims, rewards, and reporting in one place instead of across separate tools. The capabilities below map directly to the initiatives in this guide.

- **Fast, trusted invoice validation:** OCR extracts product, quantity, and pricing from invoice photos, scores confidence per field, matches products to the catalog, and flags duplicate invoice numbers. Approval workflows support SLAs and multi-level review.
- **Product registration and warranty:** QR code management and claims processing that cover both points-earning claims and warranty-only registrations.
- **Targeted schemes:** time-bound, SKU-specific schemes with custom terms, audience targeting, and approval routing before they go live.
- **Controlled onboarding:** KYC workflows, self-registration settings, and role-based login for each persona.
- **Engagement beyond transactions:** tiers, referrals, badges, leaderboards, contests, and games such as scratch cards and spin wheels.
- **Learning and user-generated content:** video publishing for training content and moderation for member-uploaded product videos.
- **Rewards members value:** a rewards marketplace with 10M+ redemption choices and persona-based catalogs.
- **Data-driven decisions:** automated reports on performance, behavior, and trends, plus segmentation for targeted campaigns.
- **Program integrity:** fraud and risk management with role-based access control for every module.

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