

fielo

B2C/B Loyalty Implementation Guide

Why IT departments choose Fielo



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Introduction

Let's picture this: your organization is planning to implement a new loyalty program—whether B2C or B2B—and you are now responsible for selecting a solution that is not only efficient but also quick, reliable, and cost-effective.

As an IT leader, you understand the complexities involved in implementing a successful loyalty program. These challenges include integrating disparate systems, ensuring real-time data updates, personalizing customer engagement, and providing timely responses to customer needs. Connecting all these dots is not straightforward, but we are here to assist.

In this guide, we delve into these technical challenges and present strategies to deploy a successful loyalty program that will exceed stakeholder expectations.

From identifying the challenges to detailing the architecture and platform capabilities, this document equips you with the knowledge and tools necessary to navigate the complexities of loyalty program implementation.

5 Typical Challenges for IT

1. Integration with existing systems

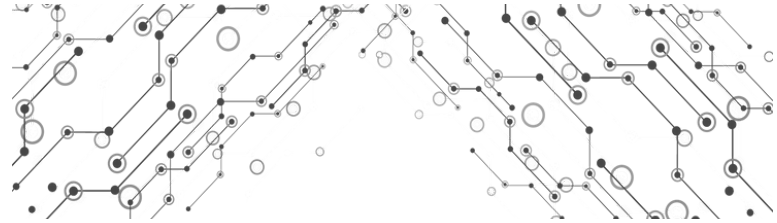
Integrating the new loyalty program with existing CRM, ERP, and POS systems can be complex, often leading to compatibility and data synchronization issues.

2. Limited resources and smaller budgets

Loyalty programs often face constraints in manpower, time, and financial resources, making it challenging to balance quality and scope.

3. Poor business requirements and scope

Clear requirements are crucial for success. Poorly defined requirements from internal departments can cause scope creep, misaligned expectations, and project delays.



4. Short delivery lead-time

IT leaders are often pressured to deliver projects quickly, which can lead to rushed implementations and increased risk of errors.

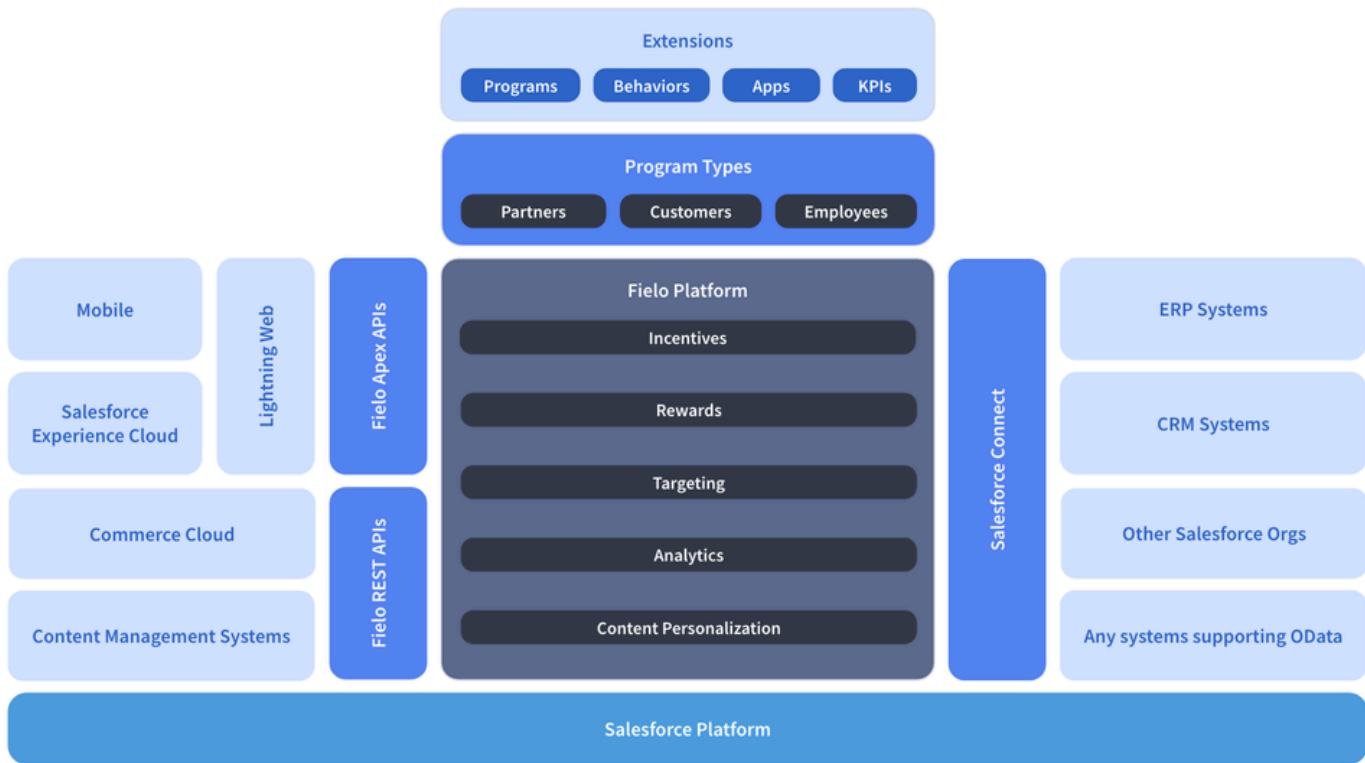
5. Scalability

The system must handle a growing number of users and data without compromising performance, making scalability essential from the start.

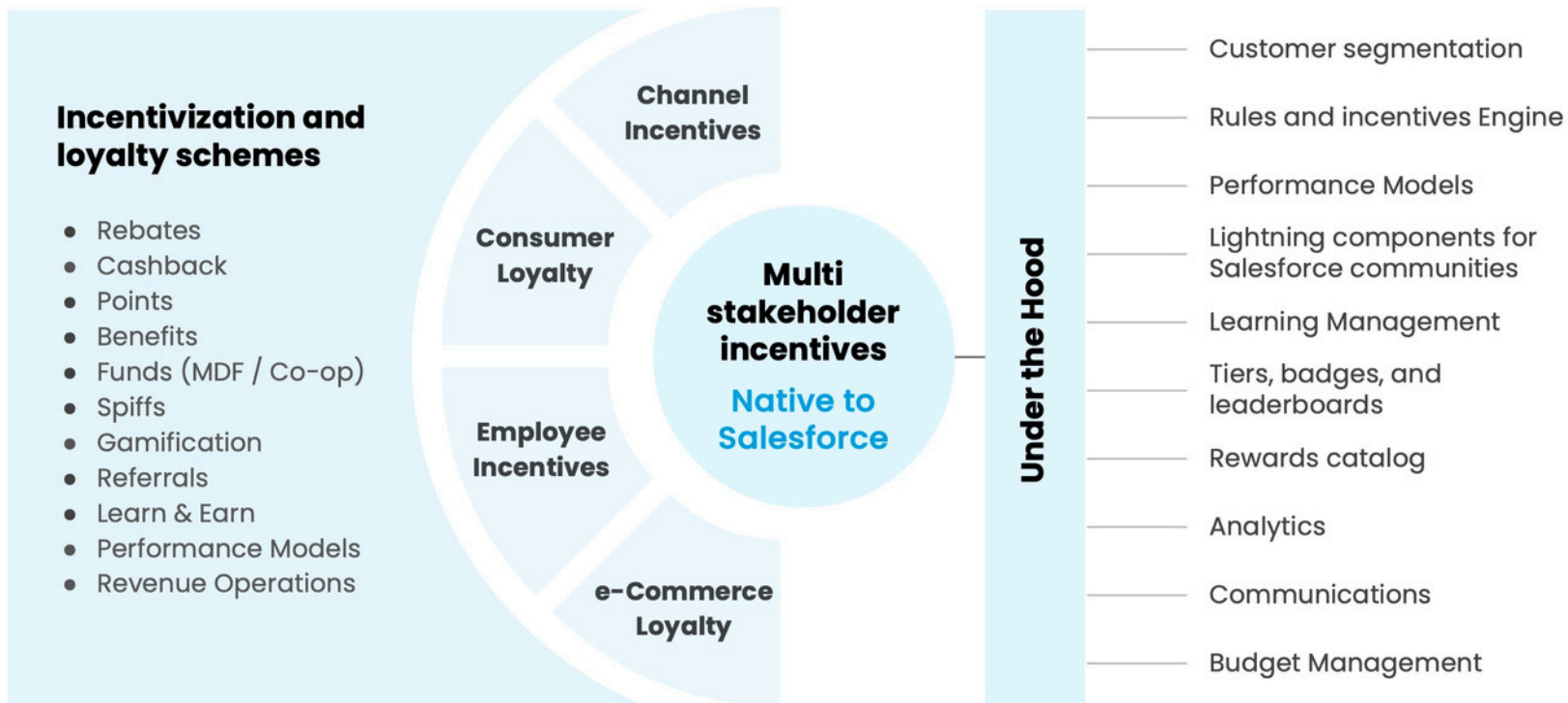
How Fielo overcomes these challenges

1. Native Integration	✓	Fielo's managed package can be downloaded and installed into your Salesforce org in minutes, it even setups itself. There is no need for field mapping, data syncing, API testing etc.
2. Cost-Effectiveness	✓	Being native means that Fielo eliminates the need for time consuming and costly system integration consultancies, agencies or SIs.
3. Loyalty Templates	✓	Fielo has embedded loyalty templates and incentive behaviors for B2C and B2B programs so that the business (rather than always IT) can setup, launch and maintain the loyalty program. It is a point & click interface that allows marketers to setup a program in minutes.
4. Quick Setup	✓	Fielo has embedded loyalty structures, settings, and mechanics that are designed for a fast implementation. With Fielo, you'll be up and running in hours or days rather than weeks or months.
5. Trusted Architecture	✓	Built on the Salesforce cloud, Fielo automatically inherits the same trust, security and governance. Fielo supports B2C, B2B and B2E programs of all sizes, from hundreds to thousands up to millions of users.

Fielo Architecture



Multi-Functional



Fielo Loyalty Capability Map

1. 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

2. Target

Segmentation

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

Tiers

- Rolling period evaluation
- Guarantee period
- Manual exceptions

3. 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

- 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

4. 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

5. Communicate

Messaging

- Transactional messaging
- Mass email campaigns
- Campaign stats

6. Measure

Analytics

- Command Center dashboards
- Goal settings for KPIs

Add-ons

Learning

- Course and Module mgmt incl cloning
- Multi content types
- Multiple question types (multiple choice, short answer, matching, etc.)
- Shuffle questions & answers incl pool
- Question weight, pass rate & penalties
- Reward with badges, points, cash

Comms Center

- Scheduled and triggered campaigns
- Personalized content
- AI Assistance
- Rich Template Editor
- Multi-channel: Email, SMS and Whatsapp

Partner Marketing Automation

- Digital Asset Management
- Customize marketing materials
- Lead generation incl email and social

RevOps

- Activity and Relationship Playbooks
- Tracking with account scoring
- Remediate1 with training and incentives
- Notification alerts & reminders
- Drill-down reporting & analytics

B2C Programs

Combine different types of benefits and rewards to foster customer loyalty and increase revenue.

- Acquisition
- Benefits & Rewards
- Brand Advocacy
- Cashback
- Catalog
- Discount/Coupon
- eCommerce
- Engagement
- Event ideas
- Frequency
- Gamification
- Gift cards
- Know your customer
- Points
- Prepaid card
- Quiz
- Recency
- Recommendation
- Retention
- Social share
- Survey

B2B/E Programs

Combine various benefits and rewards to boost engagement among partners and internal teams while driving revenue growth.

- Points
- Rebates
- SPIFFs
- Deal Registration
- Product launch
- Opportunity
- Incentive
- eCommerce/Orders
- Gamification
- Growth/Upsell target
- Product knowledge
- Customer satisfaction
- Revenue target
- PRM adoption
- Sales cycle
- Know-Your-Customer
- SKU specific target
- Inventory mgmnt
- Discount/coupons
- New logos
- Pipeline updates
- Compliance
- MDF

An ideal choice for Marketeers, Sales, HR and IT alike

Expense ✓

Fielo offers a cost-effective solution by integrating all loyalty-related activities into a single, streamlined platform, reducing both setup and operational costs.

Maintenance ✓

Fielo offers robust ongoing support and maintenance, with a scalable and secure platform capable of handling millions of users. Continuous updates ensure the platform remains up-to-date with industry standards and technological advancements.

Delivery Time ✓

Designed for rapid deployment, Fielo's ready-to-use and configurable solutions enable swift time-to-market, allowing businesses to quickly launch and benefit from their loyalty programs.

Features ✓

Fielo provides a comprehensive range of features to manage incentive and loyalty programs. Business users love that they can configure and maintain programs with ease.

Customer Proof ✓

We are delighted to work with leading brands around the world - providing incentive and loyalty solutions for their partners, consumers and employees.

Loyalty Expertise ✓

Clever software, with built-in loyalty structures, settings and features, is only part of it. Fielo goes even further by helping each customer with program design workshops, and ongoing customer success.

Conclusion

Implementing a successful loyalty program presents numerous challenges, from integrating disparate systems to managing complex points processes. Fielo addresses these issues effectively with a plug-and-play platform that ensures seamless data integration and provides a consistent customer experience across multiple channels.

With its point-and-click interface and pre-built templates, Fielo enables marketers to manage their loyalty program independently, without constantly needing new technical customizations by IT.



Altogether, this is what makes Fielo the preferred option for IT leaders seeking a scalable, secure, and user-friendly platform to transform incentive & loyalty initiatives into strategic assets that drive meaningful business growth.

Contact us and find out first hand how we make Incentives and Loyalty simple!

About Fielo:

With our loyalty and incentives platform, we help organizations of all sizes modernize their loyalty programs, turning their program into a competitive advantage.

With over a decade of focus on innovation, we've built a plug-and-play platform that integrates directly with Salesforce CRM and Clouds, eliminating the need for code or developers.

The expertise included in our product enables our customers to create their programs in just a few clicks, making management easy and uncomplicated. *Fielo is loyalty made simple!*

Learn more:

