

Loyalty Marketing Data: Your Complete Checklist

Making these types of data sets available to loyalty marketers in an easy-to-use way, empowers them to build out long-lasting, effective loyalty programs for your business.

CRM Data

- 1 The main data source for any loyalty program is that stored in a CRM (Customer Relationship Management) system. This is often a “single data truth”, but also needs supplementary data to provide a 360-degree view of a customer’s relationship with you.

Transactional Data

- 2 This provides details of the customer’s previous purchase history with you, records of points collected and redeemed. Do they buy from some product categories and not others? Do they only redeem rewards in certain categories?

Permission & Preference Data

- 3 Under initiatives like GDPR, customers have total control of how you engage with them. Building and maintaining a good relationship means you must ensure that they have the option to opt-out or express a preference for certain types of content or communication via alternate channels.

Geographic Data

- 4 Where do your customers live? Are they close to your retail locations? What about competitor locations? Are they close to your store right now? Geographic and location-based insights aid marketers in providing relevant and timely loyalty messages.

Demographic Data

- 5 What do you know about the key lifestyle traits of your member base? This could include gender, age, life-stage and socio-economic factors.

Contact History & Response Data

- 6 What have you sent to the members, when and through which channels? How did they engage with the messages?

Psychographic Data

- 7 This data pertains to the attitudes and opinions of your customers. What do they value? Typically gained through rewards redemption information, it can be built over time to create an insightful picture of who your customer is.

Digital Data

- 8 How are customers interacting with your digital touch points? Which web pages do they visit? Do they click on certain banners and links? What do they search for?

Social Media Data

- 9 What do your members say about your brand? How do you react and respond to social media conversations?

Predictive Analytics Data

- 10 Can you identify the next most likely action a member will take? Are they behaving similarly to other groups of customers? Which offers work best for which customers, at which time?

To find out more about how Purple Square CX can help you make sense of your data to enhance your loyalty strategy, contact us at

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