

Workshops: Sunday, May 31, 2009



The Gamification of Loyalty: Driving Deeper Customer Engagement Through the Power of Play

Presented by Barry Kirk and Tim Crank

To hear that 97% of teens are either casual or avid video game players is not a shocking statistic. But what's going on when 53% of adults also identify as active gamers, with 20% of them professing to play on a daily basis?

The gaming market has seen explosive growth in recent years as game designers have become experts at creating experiences that drive deep and sustained consumer engagement. These experiences create tremendous consumer commitment because they effectively employ powerful "game mechanics" that are proven to feed our psychological desire for fun and accomplishment.



Reward Business Models: Should program sponsors really earn on rewards?

Presented by Dominic Hofer

Loylogic is a reward services provider to airlines, hotels and credit card loyalty programs. Rewards are the biggest cost factor of any loyalty program. Therefore deciding on the 'right' reward business model is critical to success for the program. The Loylogic session at the LoyaltyExpo2009 will provide an opportunity to learn about how reward fulfillment models have evolved from traditional mail-order delivery to on-demand services in the digital age. It will also focus on how such models drive member engagement and satisfaction.

The discussion will address questions such as:

- How do traditional reward models compare to new, digital models?
- Which model delivers the best value to program sponsors and members?
- What are the underlying financial models that can be applied (service fee based, transaction fee based)?
- How can program sponsors control reward cost and steer their loyalty investments towards the most valuable customers?

Covering the various business models and their financial implications, Loylogic will work with the audience on the pros and cons of the discussed models, and provide insight on reward success factors for any loyalty program.



Economic Downturns: Is Loyalty Dead?

Presented by John Bartold, Todd Nelson and Barbara Olsen, Best Buy Company, Inc.

We are in the worst economic recession in our lifetime. Is loyalty dead? Consumers aren't enrolling at the same rate and members are not transacting as much, revenue is down and executives want to know if the loyalty effort is really

worth it. These metrics don't signal that loyalty is dead. We need to accept we are in a very different period and the metrics we've traditionally used to validate our efforts are not the right set under the stress test of a recessionary period.

This session will provide:

- An understanding of economic business cycles
- What we have seen and learned from past economic downturns
- Why typical loyalty measures provide false information on loyalty activity
- How to define and position the right set of measures
- How to act on those measures and continue to drive your loyalty effort



Building Stronger Customer Relationships by Mobilizing Your Company. It's not just about the transactions, it's the interaction.

Presented by Doug Rozen and Jeff Anulewicz

Bring your mobile device for this highly engaging session where you will learn how mobile marketing innovation is the next major way to build stronger relationships, getting past the transaction to create greater customer interaction. You'll understand how you can integrate mobile as part of the larger communications experience within a loyalty program to drive engagement and forge stronger relationships while not being intrusive.

While many companies today have been sampling the use of mobile as part of their marketing mix and perhaps even in their loyalty program communications, real success occurs when mobile is deployed seamlessly across multiple points - as a key component of a brand relationship. We call this 'mobilizing companies.'

Lead by Carlson Marketing Worldwide's Doug Rozen (SVP - Global Lead of Creative, Interactive, Media and Mobile) and Jeff Anulewicz (Director of Mobile Marketing), this workshop will highlight how Carlson is leading the way to mobilizing its clients. Doug and Jeff will get you involved by actually demonstrating many of the tactics available today. So don't forget your mobile device - you'll need it.



The Retention Imperative

Presented by Tom J. Salutz and John Dawson

Churn has become the major issue for many businesses in today's economy, and it may threaten their existence if they panic and lose sight of some key drivers to address it. Recently, Forrester released a study predicting that nearly 50 million Home Phone/TV/Internet/ and bundled services customers will churn in 2009. In fact, they reported that one in seven of these customers said they'll churn within the next six months. While your customer churn may or may not be that high, let us show you why any acquisition program will perform better when teamed with an effective pre-emptive retention program -- because stabilizing your customer base is absolutely required in order to grow it.

This fast paced workshop will present a step-by-step value-based way for you to proactively deal with your attrition. We will cover how to identify which customers are about to leave; explain the techniques you need to know in order to keep them; and show you how this strategy will positively effect your bottom line! So while your competition is pushing the panic button, you will be learning how to use 'push' loyalty techniques to improve your value proposition for your customer. While your competitors are hunkering down to try to keep what they have, you will be putting your business on the solid foundation of value-conscious customers, in order achieve real growth.

We have aimed this workshop at the marketer who wants to make a difference. That is the reason we will talk about the 'why' in plain English, and then focus in on the 'what' that you will need to do to keep your existing customers from leaving. We will cover the practical -- yet counter-intuitive -- secrets you will need to know in order to drive this process in your company when you get home.



Build Lifetime Value with Strategic, Cross-Channel Communications

Presented by Will Nipper, Scott McClary and Janice Rudenauer

Whether you're trying to acquire, retain or grow, creating an on-going dialogue with your customers is key to the success of maximizing the lifetime value of that relationship. From surveys of marketers about their business challenges, Acxion developed a strategic marketing process proven to improve ROI. Learn about this five-step process which includes market insights, strategic planning, campaign development, marketing communications and tracking and measurement.

This session will show you how the ability to recognize customers, make marketing decisions, present tailored offers, collect responses and close the loop on customer-initiated interactions will enable you to optimize the effectiveness of your marketing campaigns. We'll demonstrate 3 proven case studies in the five areas of our process with Fortune 500 companies in retail, financial services and media to show you best of breed strategies that may be quickly implemented for immediate wins and high profit returns.

In this session, you'll learn how to:

- Unlock potential revenue within your existing revenue base
- Make consumer-centric insights actionable
- Implement an analytics-driven marketing and measurement plan
- Simultaneously identify unique customers and their differences and act upon that knowledge—in real-time
- Build one-on-one relationships with customers using preferred communication channels



Consumer Engagement 101 (and 102!)

Presented by Ian Baer

The marketing revolution isn't just coming...it's over. And consumers have taken permanent control of the equation - selecting which brands they will embrace and which they'll reject. Discussions of impressions, response rates, data-based marketing and segmentation are being replaced by a demand for just-in-time, relevant communications that build genuine, trust-based relationships between consumers and brands. And if you think Consumer Engagement is all about "going viral" - think again.

In fact, Consumer Engagement is taking accountability to a whole new level. This session will cover the basics, and then some, of Consumer Engagement - exploring the new rules of this critical marketing discipline and sharing real-world examples of how this new approach is building powerful, often-impenetrable relationships between brands and their customers. It will also uncover how marketers can create marketing platforms that combine new media sensibility with accountability and find consumers on their terms to form a meaningful connection.



Building Engagement with Millennials

Presented by Bill Hanifin, Hanifin Loyalty LLC,
Ragy Thomas, Aiti Solutions, and Bjorn Larsen, Edhance

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We know who they are and understand their general make- up. The challenge remains to create and execute strategies to engage the Millennial generation in our Loyalty Programs. Effective communication is a challenge, as Generation Y spans an age range that deserves to be addressed in three or more distinct segments. The myriad of emerging social media tools remain unfamiliar to many marketers and complicate the task.

Join Bill Hanifin, Hanifin Loyalty LLC, and Bjorn Larsen, CEO Edhance, Inc. to share the experience of seasoned marketers who are actively involved in engaging and building loyalty across the three segments of Generation Y - Teens, University age, and Career Starters. In addition to other panelists, a leading Social Media expert will share insight into how social networks and micro-blogging tools can be incorporated into communication plans to drive engagement and build loyalty.

Long term brand loyalty is dependent on a successful first step- engagement. Don't miss this session if you want to be in touch with this increasingly powerful consumer group of over 80 Million people.



Net Promoter: A Driving Force for Customer Loyalty

Presented by Deborah Eastman, Satmetrix

Net Promoter® is both a loyalty metric and an organizational discipline that is being embraced by leading companies worldwide as the standard for measuring and improving customer loyalty. Based on customers' likelihood to recommend the company's product or service, the Net Promoter Score (NPS) enables businesses to identify its promoters and detractors. However, it's more than just score. The most successful companies using Net Promoter build out a complete operational model with NPS as its centerpiece that drives organizational change and improves the customer experience. Come hear Deborah Eastman, CMO of Satmetrix, share how companies such as Symantec, Intuit, Virgin Media, LEGO and others are using Net Promoter to transform their organization, improve the customer experience, and increase loyalty resulting in improved retention, repurchase and referrals.



Best Practices in Loyalty

Moderator: Sarah Phelps, First Annapolis

Panelists include: Jill Noblett, Wyndham, Kurt Apen, Ebay, Beverly Hollifield, AT&T

During this panel we will explore alternative strategies for getting internal buy-in for stakeholders.

Current economic times are constraining resources across all vertical channels however the three primary loyalty segments: financial institutions, retail and travel, have taken particularly harsh blows.

That said, attracting and retaining customers is mission critical in the face of declining spending, sales and travel.

Many rewards program managers are facing a mandate to comply with across the board cost cutting policies which, depending upon where they apply, stand contrary to the acquisition and retention objectives articulated above.

This panel will explore the tactics and messages that have proven successful in the past to secure (or defend) rewards program investment.

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Acting On Facts Not Faith: Identifying Realities and Myths About Loyalty To Ensure Quality In Your Research and Strategy
Presented by Tim Keiningham

- Recognizing how your own biases get in the way of genuine insights
- Identifying what is real about loyalty so you can avoid what is imaginary
- Measuring and managing loyalty to get you closer to your strategic business goals
- Examining what works -- a new view of loyalty
- Demonstrating why loyalty matters.



Introducing a Better Metric for Loyalty and Relationship Marketing: Comp Customers
Presented by Phil Rubin, rDialogue

Measuring customer loyalty and relationship marketing is far more complex than counting revenue, especially the way so many companies do, using 'comp sales' aka 'same-store' sales.

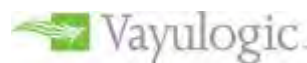
Phil Rubin will introduce you to a better way to measure customer management and effectiveness of your loyalty and relationship marketing initiatives. More importantly, this approach not only measures performance, it will be an invaluable guide to achieving better results and organic growth.

With Comp Customers™, you'll gain new insight into customer loyalty and a new way of assessing loyalty marketing opportunities that fit well within your business strategy. You'll also explore how to acquire more business from your existing customer base -- without high acquisition costs -- by ensuring that your brand, messages and offers are relevant, engaging and, most importantly, effective. Join Phil as he takes you through real-world examples and illustrations for companies with and without loyalty programs that are relevant to any industry.



Mobile Marketing - Building loyalty using the processing power and two-way communications capability in the hands of your customers

Moderator: Andrew Morris, Morris Advisors, Inc.



Mobile Marketing - Building loyalty using the processing power and two-way communications capability in the hands of your customers

Panelist: Victor Varney, Vayulogic



Mobile Marketing - Building loyalty using the processing power and two-way communications capability in the hands of your customers

Panelist: Walt Granville, RocketBux



Mobile Marketing - Building loyalty using the processing power and two-way communications capability in the hands of your customers

Panelist: Matt Monte, Datalogic

Mobile technology creates powerful new opportunities for loyalty marketers. Almost every consumer today carries their cell phone with them everywhere they go, and the device in their hand has processing power and two-way communications capabilities that allow loyalty marketers to have real-time interactions with consumers that are very personal and customized to the individual consumer and their 'mobile context.'

This panel discussion will provide attendees with broad spectrum of examples of how mobile technology can truly revolutionize loyalty marketing initiatives. Leading mobile marketing strategists and practitioners will explore:

- Key data points on consumer acceptance and responsiveness to mobile marketing and a framework for understanding the 'Mobile Marketing Ecosystem';
- Why the mobile phone represents not just one but at least five new communications channels - and a description and analysis of the pros and cons for each;
- An overview of mobile marketing 'tactics' including real-time delivery of targeted offers and coupons, leveraging mobile channels for integrated cross-channel campaigns, and engaging customer via mobile social networks;
- The most important considerations for merchants and loyalty practitioners in developing a loyalty marketing strategy that leverages mobile channels; and
- Case study examples from top brands like Adidas and Pepsi.



Journey to a 360 Degree View of the Customer: Talbots Loyalty Program Re-Launch

Presented by Sandra Gudat and Lisa Chalmers

Talbot's loyalty program, "Classic Awards," has become an established and essential ingredient to the fashion retailer's success.

Talbot's Charge customers eagerly await their "Appreciation Dividends" which in turn drives additional visits and incremental spending to the retailer. Historically, non-Talbots Charge customers were not included in the Classic Awards program, thus making it more difficult for Talbots to reach and build loyalty among this group as well as capture critical customer purchase data. Talbots senior management foresaw the benefit of gaining a greater understanding of all customers, regardless of tender, and decided to improve upon a classic and expand the reach of the loyalty program.

In January 2009, Talbots re-launched "Classic Awards" which now rewards all customers regardless of tender-type and motivates them to consolidate their category spending. At the same time the program reserves the highest level of reward for customers who use the Talbots Charge to make purchases.

Learn about Talbot's journey from building the initial business case justification (for two different CEOs!) to launching the program, to initial learnings from the first 6 months of the program.



Developing Lifetime Customer Value in a Down Economy

Presented by Sahir Anand, Aberdeen and Chris Cunnane, Aberdeen

With the increase in the pressure of lifetime customer value and the need to closely align loyalty elements with customer affinity, the single biggest common challenge facing all retailers today is the need to re-configure their organizational, strategic, and tactical objectives around the integration of loyalty operations with customer retention, acquisition, and reduced attrition goals. This workshop will provide real examples from end-users, experts and retailers on the recommended strategy roadmap to ensure that loyalty campaigns are being executed with due consideration to ideal customer segments, tools, coordinated

cross-channel marketing needs, and long-term customer relationships.



Engagement Loyalty: 4 keys to success

Presented by Ivan Frank, ePrize, LLC
Joel D. Cohen, MovieTickets.com
Ed Kowalski, CPG Retail Groupand
Stephen Guerra, Silverpop

Engagement is powerful. Whether you're measuring it or not, the industry has de facto accepted that engagement works. The problem is the HOW. How does a brand create engagement loyalty with its customers. Is it science, art, a little of both? In this session, a panel of experts led by ePrize will explore a four proven tactics and strategies that create engagement and loyalty. The output will be a framework and set of tools that you can use on "Monday morning" to help activate your program or make the case for one. We'll also answer your top questions.



Using Technology to deliver incentives to increase customer loyalty and improve your company's marketing ROI in the new economy.

Presented by Ed Braswell

Ed Braswell, CEO of edō Interactive, will present on the revolutionary technology to deliver digital incentives. The days of sending out coupons or online promo codes are over. New technology brings digital incentives into your customer's hands to create loyalty and improve your marketing ROI while at the same time offering redemption and purchasing reporting and analytics. With edō's new technology your company can track redemption and spend data in real time Come listen to Ed speak on the 4th generation of incentives.



Accelerating Customer Dialog: Social Media meets Loyalty Marketing

Moderator: David Rosen, Loyalty Lab
Panalists include: Matt Howland, President Loyalty Lab, Dave Balter, CEO BzzAgent, Greg Dolan, Director, Strategy Campbell's Soup, Teresa Caro, Razorfish

Consumer packaged goods (CPG) companies are aggressively implementing campaigns to collect names of their consumers, but once the campaign is over, continuing the dialog with consumers requires a different value proposition, benefits, engagement frameworks and empowering technologies. Rather than mourn the death of the one-off campaign, marketers must look forward to how loyalty best practices and tolls can lead them to a new level of consumer engagement and profitability.

In this session, David Rosen, Loyalty Lab's senior vice president of Strategy and Channel Development will moderate a panel of CPG marketers and social media, loyalty, and interactive marketing experts to show how loyalty concepts are changing the way CPG's develop relationships with end customers.

Attendees will learn:

- Strategies that enhance individual campaigns to drive long term relationships
- Methods for collecting data and engaging customers in many channels

- Ideas for incorporating social media in measurable and meaningful ways

GALLUP CONSULTING **From Price to Advice: Driving Sustainable Advantage
in B2B Markets**
Presented by Blaise James

How healthy are your customer relationships in this turbulent economy? New Gallup research shows only 13% of business-to-business customers are fully engaged - that is, rationally and emotionally loyal to their suppliers, vendors or partners. That means a typical B2B company has what would be considered an optimal relationship with less than one in seven of its customers.

How can you ensure your customers stay loyal? The conventional wisdom in B2B markets is to bolster customer relationships through rational components like price, speed and efficiency. While these are important, Gallup has found emotional components of the relationship are better indicators of loyalty. They also provide a more effective 'early warning system' for at-risk accounts than typical B2B measures like customer satisfaction, revenue, or profitability alone.

B2B companies can secure customer engagement by instilling a sense of confidence, demonstrating integrity, and creating pride and passion around their brands and product/service offerings. In B2B markets across every industry, this is achieved by shifting the focus from price to advice - from transactional selling to providing value - to create client impact.

After today's presentation, you'll understand:

- How customer engagement in B2B is driven by client impact
- The three key components that create client impact
- How to create an 'early warning' score for your customers
- The five intervention zones used to address your 'red-flag' accounts

What if our loyalty programs could capture even a fraction of the level of engagement driven by these games? We play games because they promise a payoff for our effort -- loyalty marketers have always known and employed this simple premise in their programs, but how many have ever looked at those programs as games? How would your loyalty strategy change tomorrow if you started to view your program as a "game" and your members as "players"?

This workshop will explore the idea of how adopting a game-centric view of your loyalty initiative can bring a whole new perspective to the most effective way to engage consumers, with a particular focus on creating awareness and understanding of proven game mechanics and how to use them to drive better program design.

brandMiND **Inside-out Loyalty: Understanding the Psyche of Today's
Loyal Consumer**
Presented by Dave Tambling and Connie Chesner

A presentation filled with first-hand perspectives on loyalty in 2009, incorporating real voice of customer clips (audio and video) including market thoughts on everything from current memberships, programs, and affiliation to key drivers of participation, decisions, and motivation.

This primary research presentation uses one-to-one conversations with a diverse cross-section of consumers to dig into the current customer loyalty landscape from an 'on the street' perspective, offering frank insights and customer talk about programs and participation. This data, presented for the first time ever at the Loyalty Expo, offers attendees a unique opportunity to stay ahead of the competition through deep insights into what customers are thinking right now in 2009.

Insights from interviews are presented and then core themes are revealed regarding trends every loyalty program should watch and incorporate into their strategies for survival in a tough economy.



**The Evolution of Consumer Communication Preferences:
Time to Re-evaluate Your Strategy**
Presented by Mark Friedman, Soundbite

Session description:

The landscape has changed for today's marketers. With the emergence of new technologies, the impact of federal regulations, and the evolution of consumer choice – marketers have no alternative but to reevaluate their marketing communication strategies. As marketers, we must understand:

- The regulatory impact on customer communications in 2009
- The importance of consumer preferences in today's economic environment
- How to create and maintain successful communications programs for
 - Opt-in
 - Preference Management

Key takeaways:

- Using consumer preferences to improve customer satisfaction and loyalty
- Creating a program to gain customer opt-in on their preferred channels
- Determining the right communication channels to yield the best results and how to maintain that data
- Incorporating the more-widely accepted SMS communications into your marketing mix
- Reducing direct mail costs while increasing brand awareness

For more information or to schedule a product demo visit us at Booth#508 or email info@soundbite.com



Loyalty in a Tough Economy: Using Analytics to Attract and Retain Customers
Presented by JJ Rorie

Budgets and resources are crunched, making it even more important to direct marketing dollars and manpower to the right places. Analytics is about knowing more about your customers - and the people you want to become your customers. Armed with that information, marketers can better identify their best customers, those who are most likely to respond to an offer and even flag customers that may be planning to leave.

In this session, JJ Rorie, First Data director of product development, will show how retailers and financial institutions of all sizes can use analytics to make smarter offers to the right customers without huge upfront technology costs. She'll use case studies to show how companies of all sizes can use the technology to solve business problems.

Attendees for the session will leave with an overview of how they can:

- Use analytics to acquire and hold onto customers
- Overcome common hurdles in implementation
- Leverage 'hidden' information within your company to create a more robust program
- Create and track appropriate metrics to track success



Global loyalty: Challenges of International Loyalty Programmes

Presented by Derk Möller, Arvato rewards and Scott Richardson, Global Key Account, Airline Loyalty

More and more, global loyalty programmes are becoming the normality/standard rather than the exception in today's loyalty market. Nowadays consumers - informed by the internet and empowered by their mobile devices - are actively engaged in the way their favorite brands or companies behave in the marketplace. This allows the consumers, and with this, the world of loyalty to grow together. Cross-country and even global loyalty programmers such as Miles & More and The Emirates High Street (present in 62 countries) are wide-spread.

- Research has shown that 80% of a rewards portfolio in such a global loyalty programme can be designed to meet global wants and needs. However, 20% of the rewards still cater to the very individual country-specific taste of the consumer.
- This presentation will provide insights into how to manage and compile a global rewards portfolio, review the opportunities and risks involved in setting-up and managing a global loyalty programme and explain how to anticipate and fulfil the desires of your potential global customer today.



Innovation in Loyalty Programs: Best Practices and Case Studies

Presented by Tom Beecher, Mall Networks, Adam Bashe, Futuretrust,

Today's loyalty marketers face unprecedented challenges with their loyalty programs. With the proliferation of loyalty programs -- there are over one billion memberships across the U.S. -- it has become imperative for loyalty programs to innovate to enhance their value proposition and win the battle for loyalty. At the same time, there is intense pressure to control costs. This panel will discuss how several organizations have faced this challenge with new technology, partnerships, and value propositions. Futuretrust will speak to their experiences in developing a successful loyalty program for their retail brands such as Mothers Work. The panel will cover:

- Drivers and industry trends that are causing organizations to take fresh looks at their programs
- What new technologies, services, and partnerships loyalty marketers are leveraging for innovation
- What are best practices in launching and communicating the value proposition of these enhancements
- How organizations build internal consensus to proceed with enhancements with today's focus on cost-cutting



Driver's License for Loyalty - Research, Results, and Reality

Presented by Brent Harms

IDLoyalty is transforming loyalty programs by allowing members to use the card they already carry, their driver's license. You can eliminate data entry and plastic cards. The driver's license as a loyalty card delivers a triple bottom line benefit - more convenient for the members, more profits for the business, and reduction of plastic in the world.

Marketing research results will be presented at the Loyalty Expo. These results will help all loyalty providers understand how members prefer to engage in loyalty programs. In addition, IDLoyalty will be sharing some early test case results from customers that have recently begun to use the driver's license as the loyalty card. Don't miss this opportunity to hear about innovative ideas and timely research results that can enhance your loyalty program and

reduce costs!



Retailer-Bank Partnerships - Going Beyond Merchant-Funded Rewards

Presented by Jonathan Silver, Affinity Solutions and Nick Medina, ExxonMobil Speedpass

Affinity Solutions, the leader in retailer-based shopping rewards programs and ExxonMobil, will demonstrate what it takes to create a truly 'win-win' relationship between retailers and financial institutions. The goal in any partnership is to create '1+1=3' - Affinity Solutions and ExxonMobil will describe a proven methodology for driving new customers and share of wallet for retailers - as well as incremental card spend, acquisition, retention and cross-sell for financial institutions. At this session, you'll learn:

- Why traditional 'merchant-funded rewards' programs are challenged
- How to develop custom programs between banks and retailers that leverage both stakeholders' hidden assets
- How Affinity's analytic models, using cardholder transaction data to drive purchase behavior and card preference, for different consumer segments
- How Affinity is re-defining loyalty as enhancing the consumer shopping experience: 'delighting and entertaining customers before, during and after they shop'
- How retailer-bank partnerships can significantly enhance cross-sell, acquisition and retention for financial institutions - not just card spend
- The value of retailer-bank partnerships to deliver insights to help you run your business

You won't want to miss this session, showing you how to create highly differentiated executions that deliver more value at a substantially lower investment.



iPhonifying Loyalty - Micro-offers and mobile Interaction: Leveraging today's mobile technologies to Move Product, Reduce Inventory, and increase Communication

Presented by Michael Hemsey

Kobie Marketing is an award-winning loyalty marketing agency with 20 years of experience in developing coalitions and alliances, implementing innovative customer relationship management and loyalty systems, and growing new market opportunities on behalf of our diverse client base. Kobie has served numerous customers within the Retail, Financial Services, Card and Payments, Telecommunications, Travel and Specialty Retail industries, designing and managing B2B, B2C and B2E loyalty strategies.

The Kobie team has experience with top retailers, including Home Depot, Canadian Tire, Barnes and Noble, Eckerd Drugs, Sears and Northern Reflections, among others. We also have had long-term client relationships with exceptional brands like Bank of America (and MBNA), American General Finance, Advanta, Royal Bank of Canada, Verizon, Comcast, Cellular One, Time Warner, CBS Sportsline, and Lucasfilm. These relationships have been successful because of the innovative solutions we bring to our clients' business challenges, and our refreshing, high-touch approach that allows us to be agile and responsive to our clients' changing needs.



High-Definition Loyalty: Clarifying a New Vision for Customer Retention and Growth

Presented by Rich Phillips

As American consumers shift their TV viewing experience from analog to digital, they will immediately find themselves seeing the world with a new, fresh perspective. High definition brings into visual focus an amazing amount of detail and information that we were never able to see before because of the limitations of the technology. At the same time, the clarity of HD also reveals flaws in what we formerly thought was perfection. In much the same way, Loyalty Marketing is moving into its own transition to High Definition, a shift that will bring consumer needs and attitudes into greater clarity while challenging our very notion of "loyal" and our assumptions about the best techniques to affect consumer choice.

In this session we'll consider four major shifts we see on the horizon for the loyalty space and suggest how best to prepare for them, including:

- The Shifting Conversation - "dialogue" marketing drove a shift in brand communication from a push strategy (brand-to-consumer) to a two-way interaction between customer and brand. The HD Loyalty world will recognize the conversation is changing once again as the emerging consumer-to-consumer dialogue becomes more critical.
- New Clarity Around "Advocates" - these new conversations will drive us beyond "purchase" and "referral" to discover new definitions of "loyal" and "advocate." This will be an HD world where any activity can become a measure of "engagement" that can be tracked, measured and rewarded.
- Perceiving Loyalty in Brand New Places - loyalty is already moving beyond its traditional application and will increasingly be showing up in new and exciting areas. HD Loyalty considers employees and channel partners, as well as consumers.
- The Need for Hyper-speed - loyalty programs traditionally embraced a "slow and steady wins the race" mentality - building brand affinity over time. In the new world of social and mobile, speed will become critical to effective HD loyalty strategies.



Why guess when you can know? Creative ways to measure loyalty programs
Presented by Wayde Fleener

When determining your measurement plan for any type of a relationship building effort, there are all kinds of business challenges to drive how you will choose the appropriate measurement treatment or approach. In this exciting session, you will hear about the traditional ways to measure your relationship building effort and the obstacles that can get in the way. But most important, we will highlight two innovative ways to measure your relationship marketing effort to help inform the best way to build stronger relationships.

Key takeaways:

- A review of the traditional ways to measure relationship building programs
- A discussion of the obstacles that get in the way
- An exploration of two innovative ways to measure your relationship building program



Bridge2 Solutions, Inc.

Translating Millions of Rewards into Personal Engagement

Moderator: Andy Althouser
Panelists: Mike Ruege, USM, Andy Brown, Fiserv, Rick Blabolil, Marketing Innovators International, Inc., James Purdy, Bridge2 Solutions and Betsy Leatherman, Razr Marketing

Hear from loyalty industry leaders on how they are leveraging dynamic, real-time collections of millions of rewards in their loyalty programs and driving higher individual interest and participation. Dynamic reward collections are always

up-to-date with the latest models and can offer millions of reward choices. Learn how this rewards technology advancement coupled with excellent front end management systems are actually enhancing the personalization of programs, engaging participants and driving results for the loyalty industry.



Loyalty Program Best Practices in Challenging Times

Moderator: Mike Ryan, MADISON Performance

Panelists: Louise Anderson, IP, Anderson Performance Improvement, Greg Lewis, Motivation Excellence, Inc, Tom Webster, ITAGroup

The economy has hit a rough patch. That's not news to anyone. What is noteworthy is this: While many CEOs believe the financial climate will continue to worsen during the next 12 months, they also expect their firms to outperform the competition. What does that mean to loyalty programs? Faced with diminishing resources and elevated expectations, marketing leaders are being asked to do more with less. So what are the best practices in loyalty planning and execution? What tools and techniques are helping firms optimize outcomes? How are progressive companies capturing wallet share while strengthening customer equity in challenging times?

Join customer loyalty experts from the Incentive Marketing Association's Performance Improvement Council as they examine four cutting-edge case studies. During this panel discussion attendees will hear how...

- Advances in technology are helping firms more effectively segment value propositions.
- Improved data analytics are helping sponsors respond to shifting market forces quickly.
- Next generation reporting tools are helping managers gain a bigger seat at the planning table.
- Other corporate initiatives can be linked into the loyalty business case.



CensusTalk 2009: Sizing Up the U.S. Loyalty Marketing Industry

Presentation By Rick Ferguson

In the first comprehensive census-taking of loyalty marketing since the modern loyalty era began with frequent flyer incentives in the 1980's, COLLOQUY reported in 2006 that membership in U.S. loyalty rewards programs had reached 1.3 billion, more than four times the national population. Three years later, get the latest facts and figures of new and updated groundbreaking research and discover the implications across a variety of industries including Airlines, Financial Services, Hotel, Restaurant, Gaming, Grocery, Retail Fuel, Specialty Retail, Drug and Discount Stores, Department Stores, and Internet.



B2B Customer Insulation: From Shared to Exclusive

Presented by Doug Press, The Incentive Group and Al Kelley, NEC Unified Solutions

Everyone seems to agree that there are arguably fewer new customers to be had in this challenged economy. As such, the savvy CMO embraces this and deftly focuses on keeping every last existing customer that he or she possibly can. To effectively accomplish this, we need to not only deploy strategies and systems that will optimize overall customer retention, but also protect the revenue stream of all existing products and services. A carefully architected Customer Insulation strategy takes it to the next level and actually works to increase the spend of segmented tiers of existing customers. How? By fostering a robust Customer Dialogue, getting them to consolidate on purchasing your product vis-à-vis your competitors, optimizing your share of account and achieving....yes...growth. With year over year attrition reduced and cross sell effectively harvested, revenue gains are once again possible.

This informative session will profile strategies, best practices and an innovative Dashboard tool used in successful B2B Customer Loyalty programs to maximize Customer Insulation and achieve winning ROI. A detailed Case Study will be shared by NEC Unified Solutions, providing a practical example of a uniquely successful campaign that we can all learn from...set in a highly competitive, multi-channel sales environment.



What can we learn from the Grocer about Customer Loyalty? What is the glue that makes the finicky grocery shopper stick?

Presented by Steve Babick, President and CEO of MetroSplash Systems Group, Inc. and Jose Martinez, CEO of Grand Incentives Inc.

While it may be disputed who was the first retailer to offer a loyalty program no one can deny that grocery merchants have been offering loyalty programs for over a century. As one of the consumer's most frequent spends, the Grocer's customer lifecycle moves quickly and frequently with heavy interference from competition from all types of retailers. Grocers have mastered the ability to attract new customers and were among the first to promote loyalty through consumer programs, now they've found the secret to retention with a powerful incentive.

Hear from two leading grocery reward and incentive firms, as they share the secret on why Fuel is an ideal incentive to not only attract new customers, but to also retain that consumer's loyalty. Steve Babick, President and CEO of MetroSplash Systems Group, Inc. and Jose Martinez, CEO of Grand Incentives Inc., will also share their successes with FuelLinks® and Convert Gas-to-Cash®, both powerful loyalty solutions within the grocery industry and more. Gas is the Glue that Makes Loyal Consumers Stick.



Optimizing Consumer Engagement with Your Brand

Presented by Bob Fetter, Pluris

In today's economy, it is important for marketers to stimulate consumer purchase behavior and capture a larger share of wallet than ever before. With most companies suffering through precipitous sales drops, marketing budgets are being slashed at a time when it is more important than ever to continually market to consumers in a relevant and engaging way.

In this session, we will show how to:

- Leverage digital messaging and the latest technologies, embedded with data and analytics, to optimize every consumer touch, inbound or outbound
- Stimulate greater consumer engagement with the brand with an optimized offer and or message
- Supplement an existing loyalty program and drive participation in that program
- Formulate key considerations in designing a new loyalty program to support maximum uptake of that program as well as consumer involvement with the program

This advanced session with key statistical and technological concepts is very detailed in how to guidance that it provides to participants.



The New 4P's of New-Era Customer Engagement Marketing

Presented by Marti Beller

Amid dramatic cutbacks in consumer spending and one of the most severe recessions in modern history, the mainstream ways of marketing will have to be invigorated with new energy to keep consumer interest and spending - Customer Engagement. For most companies, today's 'customer engagement' initiatives - whether they drive stickier websites, greater usage of core products, or strengthen brand recognition - are positioned to support a higher organizational need: increased profitability from a shrinking viable customer base.

ALG will offer nearly 30 years of unparalleled experience on behavioral incentives and affinity marketing strategies to define and reinforce our view of customer engagement and the role it should play during these difficult economic times. We will identify the new 4 Ps of this marketing era to help readers gain a foothold on what is necessary to truly achieve the ever-elusive 'customer engagement' goal.

The 4Ps of New-Era Customer Engagement Marketing

- **Perspective** Use your data. Affinion will provide case studies to help illustrate the power of customer data , and how it can provide a new way of analyzing unseen truths within organizations. Pairing this data with today's altered perspectives can help generate new marketing strategies in an accelerated fashion.
- **Purpose** Know your brand. During times of extreme uncertainty, it's important to understand and promote your brand to your most loyal customers. Start by understanding the brand promise resonating loudest with the most attractive segments of your customer base. Then, capitalize upon that information to support optimized customer behavior(s).
- **Path** Identify your new direction. The luxury of endless competing marketing strategies is cast aside in this new era of customer engagement marketing. In a sea of uncontrollable variables, know the path you're going to follow and understand the importance of measuring against goals along the way. Set a clear bar by which to measure success and develop marketing and product strategies that reinforce those areas of measurement.
- **Proliferation** Test and learn. Yesterday's overachieving results may become today's control amidst a new demand for more stringent metrics. Analyze results prudently and continue to view your findings back through the lenses of customer understanding and optimization; delivery of your brand promise; and customer satisfaction and engagement.



Going from 0-120 mph in 18 months: How Sainsbury, UK is using granular customer data to shape the Shopping Experience, build Customer Intimacy and drive Customer Loyalty in one of the world's toughest markets.

Presented by Mike Blyth

Sainsbury is one of the world's largest grocers. It has a unique position as a successful Grocery led marketing coalition driven by the Nectar Rewards program. In this session you will hear why and how the Nectar program was developed and the impact it's had on coalition members. You'll then hear how Sainsbury developed a highly granular SKU level understanding of its customers' behavior in record time, so that its teams could leverage a customer information advantage. The ability to rapidly leverage this detailed customer understanding is leading to smarter marketing, merchandising, and store and supply chain decisions that are shaping a more relevant in store shopping experience and building customer intimacy.

In this session you will learn:

- How to build and execute NextGen Customer Insights and Communications Programs
- How to build company momentum in to leverage these new Insights and Tools
- How to create collaborations hubs to harness Consumer Package Good companies smarts and resources

- What kind of early and long term success cases you can expect
- What lesson can be learned from the successes and the minefields you should avoid?



The Perfect Storm in Debit Loyalty.
Presented by Lynne Laube and Scott Grimes

Debit usage continues to climb and solidify its position as the dominant electronic payment vehicle. Over the past year, major banks have launched competitive debit rewards programs and customers are increasingly aware of these offerings. While many banks have been reluctant to pay debit rewards given relatively low debit interchange, research shows customers are likely to switch to banks that reward card usage and loyalty. Merchant funded rewards provide a tool to build compelling loyalty offers with economics outside of banking.

From the inventors of decoupled debit, this presentation will discuss the evolution of merchant funded rewards and highlight some of the emerging trends and developments that banks can take advantage of to keep their existing customers and even attract new customers.



ALLEGIANCE **How to Make Voice-of-Customer (VOC), Enterprise Feedback and Engagement Initiatives Payoff**
Presented by Chris Cottle and Claire Howells

Creating surveys, listening to customer feedback and gathering data are great to do, but how do you make them payoff. How do you get boardroom visibility for your initiatives? Chris Cottle, VP Marketing at Allegiance and Claire Howells, VP Engagement at Zions Bancorporation will present the best way to monetize what you do, reveal what metrics matter most, and share real-world examples of the best and the worst practices.

- Get VOC, EFM and Engagement Best Practices
- Learn the challenges and successes of real companies
- Learn how much data you need to be gathering to make great business decisions
- Do you have a scientifically-based measurement practice in place?
- Learn what technologies businesses should really be using for successful VOC



Wake Up And Smell The Loyalty- How Loyalty Metrics Could Have Prevented Starbucks From Burning the Brand (And Other Predictive Loyalty Applications)

Change seems to come upon brands suddenly. But a marketing misstep or a loss of brand dominance is not usually an overnight phenomenon. When things become obvious because they have already happened, brands ultimately glance backwards and note the harbingers that were not attended to and category and customer value shifts that were dismissed as irrelevant.

Loyalty metrics, however, are predictive and - properly configured - can act as leading-indicators of consumer behavior and brand profitability. It takes some thought and design skill, but any aspect of the marketing mix can be measured predictively: your brand, your media, your advertising and promotion.

In addition to loyalty metrics showing why the Euro-cool Starbucks lost out to blue-collar Dunkin' Donuts when it could have identified a winning strategy, the brand loyalty experts will show you:

- How consumers shape categories and what they really expect brands to deliver.
- How Lucky Brand Jeans optimized media planning using category specific consumption based loyalty and engagement metrics.
- How Dove Turned Their 'Campaign for Real Beauty' into a Cross-Media Winner.
- The Mac-PC Wars: What drives loyalty in the computer category, and why the Seinfeld-Gates team was doomed.



Matchmaking in 2009: How Merchant Networks Connect Retailers with Engaged Consumers

Moderator: Sarah Arvin, Vesdia ([view Sarah's bio](#))

Panelists: Chris Miller, Golfsmith International, Inc., Debbie Arett, Avis Budget Group, Angie Martin, Sunglass Hut, and Jim Douglass, Vesdia Corporation

'Going it alone' may initially sound like a sound strategy for innovative and well known companies, however, tough times are almost always best navigated by focusing on what you do best. Matchmaking in 2009 is about connecting companies from a variety of industries with similar objectives and delivering higher consumer value through the combination. Merchant networks do this by marketing retailers to valuable consumers in targeted loyalty programs.

Learn from a panel of leading retailers and loyalty programs how successful merchant networks have helped merchants drive customer acquisition, retention, and incremental sales. The session will demonstrate how to match retailers with travel, grocery and bank loyalty programs, market relevant additional earning opportunities to consumers, and ultimately drive incremental sales for all involved.



Focus On Credit Card Loyalty in Difficult Financial Times

Presented by Marcin Kosciak, Comarch and Dan Thompson, Pemco Technologies

The presentation will focus on the changing dynamics of credit and debit card reward programs as the result of the economic downturn. Dan will also give us an insight in the limitations in the credit card usage that are caused by personal choice or by actions taken by the card issuers to limit risk. This, in return, brings up a question whether a credit card rewards program still makes cents (dollars too!) Is there really a significant (and measurable) difference in behavior between rewards and non-rewards credit cards?

Roundtable Discussions: Tuesday, June 2, 2009



Trends in Legislation and Loyalty Funding

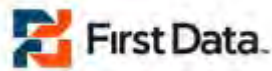
Hosted by Mark Shipley



The Retention Imperative

Hanifin Loyalty
Group

Social Media and Loyalty: How do they fit?



**Partnership Marketing: Financial Institutions and Retailers
Can Build Stronger Loyalty Programs - Together**
Hosted by Julie Bohn and Jonathan Silver



You Know The Problem With Loyalty?



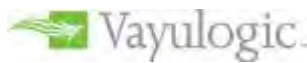
Integrating Loyalty Into The Organization

Social Networking

Roundtable Discussion



Loyalty Lessons Learned in the Grocery Sector
Hosted by Patrick Finnigan, Metrosplash



**"How do we get customers to opt-in to our mobile loyalty
program?"**

Hosted by Victor Varney, Vayulogic



How to Assess and Benchmark Your Loyalty Program

R&P
Group

Roundtable Discussion



Roundtable Discussion
Hosted by Andy Wright



Customer Latency: Moving Beyond Acquisition and Focusing on a Strategy to Engage Customers and Maximize Profits



Ask the Expert B2B Loyalty Program Q&A



Roundtable Discussion



Roundtable Discussion



**Creating Disruptive Change in the Incentives Industry:
Connecting with the Networked World**

Presented by Mike Reynolds, Parago

