

A 5LOYALTY + TALKBOX EXPLAINER

Maximizing Customer Retention

Hands-free marketing meets brand-aware loyalty.
Your automated marketing program explained.



Hands-free marketing meets brand-aware loyalty



Did you know that
up to 65%
of customers
don't return?

Your automated marketing program explained

5Loyalty and TalkBox by Impact Data have partnered to change this stat for **your** business.

The power of 5Loyalty is in creating a loyalty program that works for your business. The combination of flexible loyalty tools, online ordering and gift cards creates the right loyalty solution for your business.

When you add the automated marketing of TalkBox by Impact Data, customers are **5x more likely to visit**. TalkBox knows when to watch frequent customers, target for another visit or incentivise a lapsing customer. It's like having a team of analysts running your loyalty engagement and retention program to **maximise your return on investment**.

The TalkBox team know the 'messages that matter' and will build them in your branding, with your tone of voice, with the right 5Loyalty vouchers set up and activate them with you to help you drive your loyalty program to the next level.

5Loyalty and TalkBox have a voucher connection that means issuing a voucher to a customer for their birthday, because they haven't visited in a while or getting them to try a new product is as easy as sending an email, SMS message or push notification.

Because we know that a loyalty program without communications is just giving away margin....

Getting to know your TalkBox account

Your automated marketing program is a combination of a number of elements:

- A TalkBox account connected to your 5Loyalty program
- Customer contacts added as they join the program
- Each day TalkBox is updated with order and loyalty information about your members
- TalkBox analyses the behaviour of customers and updates a number of fields
- Those fields are used to trigger messages designed to engage and retain your customers and make sure they keep coming back

Plus, with all of this **'marketing-ready' data** in your account, your team can easily segment and communicate to your customers about news, updates and promotions.

The Messages that matter to:



**GET NEW
CUSTOMERS TO
RETURN**



**DRIVE CUSTOMERS TO
THE NEXT LOYALTY
MILESTONE**



**EFFORTLESSLY
INCREASE GIFT
CARD SALES**



**ENGAGE CUSTOMERS WITH
YOUR LOYALTY PROGRAM**



**INFORM CUSTOMERS THEIR
REWARD HAS BEEN ISSUED**

Your TalkBox Fields Explained

Understanding the marketing ready fields in your account.

Your TalkBox account has a number of fields that are updated by 5Loyalty or calculated by TalkBox to help you better understand the behaviour of your customers and target them accordingly.

The types of fields in your account:

Standard Contact Fields

Connection Fields

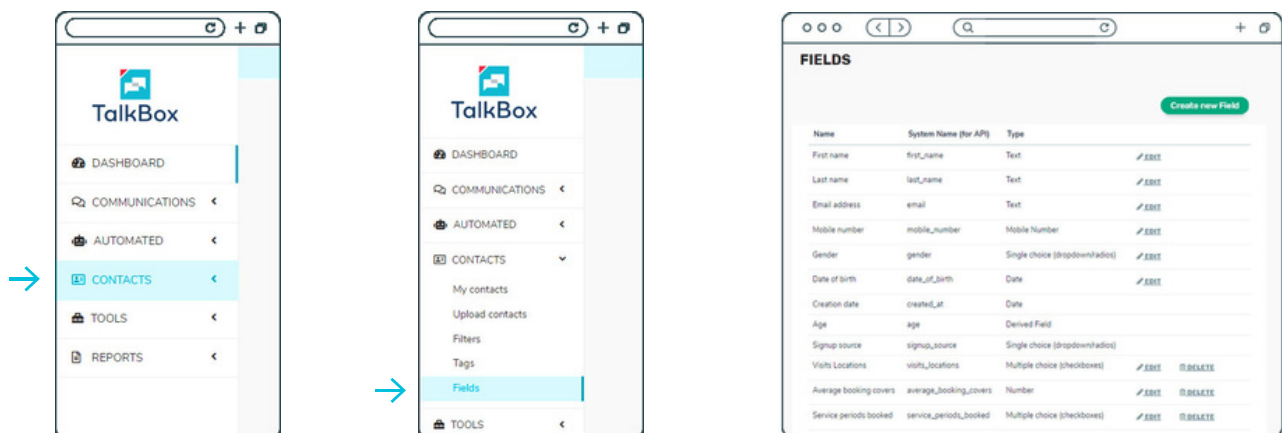
Formula Fields

You can find them in your account by navigating from:

1. Dashboard

2. Contacts

3. Fields



Standard Contact Fields

These fields are the information that helps you to identify and connect a customer e.g. *First Name, Mobile Number* etc.

These fields are added from what you capture when a new loyalty customer is created. Your account is in Mirror Mode, which means it directly mirrors the contacts that you have in your 5Loyalty account. The External ID field in TalkBox is the same number as your 5Loyalty Member ID in your 5Loyalty account.

Connection Fields

The connections that drive your automated marketing solution are represented in TalkBox as a number of standard fields that are listed below. These fields help you to understand the relationship your customer has with your business and are used in targeting customers with automated messages to get more visits, more often.

5Loyalty Fields

5Loyalty Available Points

Total number of 5Loyalty Points Available

5Loyalty Total Points Earned

Lifetime number of 5Loyalty Points Earned

Visit Fields

Total visits

Total number of observed visits

First visit date

First observed visit

Last visit date

Most recent observed visit

Expected next visit date

Calculated date based on all observed visits; this requires at least 3 visits

Visit frequency

High, medium or low based on average interval between visits where top 25% equals high & bottom 25% equals low

Days since last visit

Number of days since last observed visit

Weekday visited

Any weekday (Mon — Sun) where there is an observed visit

POS Fields

Average visit spend

Average POS spend per visit

Spend range

High, medium or low based on average visit spend where top 25% equals high & bottom 25% equals low

Location Fields

Visit locations

List of all locations a contact has recorded a transaction

Last location visited

Single location of where most recent transaction has occurred

Formula Fields

These are calculated fields in your TalkBox account to help segment your members and trigger messages to drive the loyalty program

Redeemed Points

Lifetime points redeemed

Visited in last 7/30/90 days

Visited in the last 7, 30 or 90 days

Joined more than 100/1000 Days ago

Joined more than 100 or 1000 days ago

Average Spend Less Than 20/50

Average spend less than 20 or 50 dollars

Average Spend More Than 20/50/100

Average spend more than 20

Multiple of 4/5/9/10 Visits

Total of 4, 5, 9 or 10 visits



Member Subscriptions

If a customer chooses to change their subscription status from a TalkBox communication, TalkBox will inform 5Loyalty of the change. That means that subscriptions are synched between the two systems, so you know exactly how contactable your database is.



TalkBox Filters

Filters are a combination of more than one field and can be useful to segment your audience. Some useful examples include:

High visit frequency + High Spend Range = **Top 25% of your database**

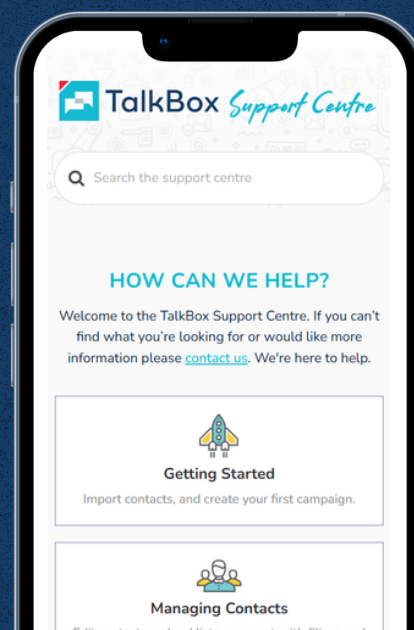
Day of week visited = Friday + Saturday + Sunday = **Weekenders**

When your TalkBox account is created, we will set up a number of useful filters to assist in getting more engagement and visits from your loyalty members,

Check out our Support Centre for

[10 Useful Filters >](#)

[Loyalty Program Filters >](#)



Automated Communications to drive your loyalty program

The TalkBox and 5Loyalty Teams have developed the messages that matter to drive more orders, visits and a return on your loyalty investment. These communications will be set up and activated with 5Loyalty vouchers in your account with your branding.

You can add to, change or update your Automated Communications by navigating to > **Automated / Date Triggered**

The 5Loyalty Messages That Matter:

Welcome and Welcome to Program - to acknowledge a new customer or to remind a customer that's on the database but hasn't been visiting to come back

Update Details - to capture DOB

Birthday Message - a message to acknowledge your customer's birthday

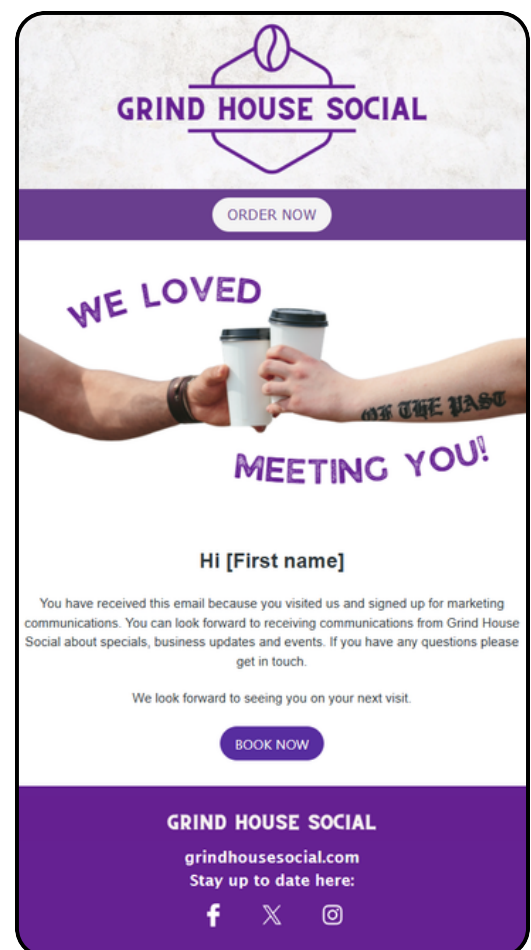
Celebrate Me - until we capture DOB, we send messages to celebrate the anniversary of a customer's sign-up

Revisit Series - a number of messages to turn a new customer into a loyal regular and build your brand into a habit

Lost Customer Series - after a customer has had 3 visits, we can calculate the next time they should visit and if they miss it, we will trigger messages to get them to return

Loyalty Prompts - we prompt customers close to a loyalty reward milestone to visit and then to redeem the reward they have earned

Gift Cards - if your business sells digital gift cards, we will add regular communications to remind members and prompt sales. This template can be used for key gifting occasions like Mother's Day and Christmas.



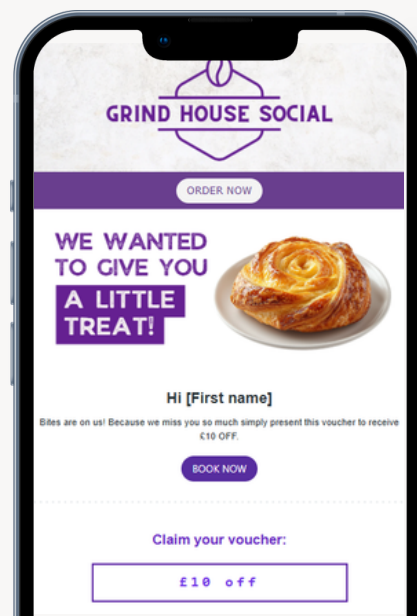
An example of a Welcome to Program message

5Loyalty Vouchers

The connection between your 5Loyalty and TalkBox accounts means that vouchers that you set up in 5Loyalty are automatically available to be included in your TalkBox communications.

Navigate to > **Tools / Vouchers** and you can see the vouchers available.

Need help setting up your 5Loyalty vouchers?
Contact support@5loyalty.com



TalkBox Reporting

Your TalkBox account has a series of reports that can help you understand the effectiveness of your marketing campaigns.

Communication Reports - check on the engagement of individual communications

Automated Communication Reports - review the effectiveness of the automated communications set up in your account

Voucher Reports - see how many vouchers have been redeemed and are still live for your campaigns

Net Promoter Score Reports - check your total score and even filter by location or day of week to understand your customer sentiment

Account Performance Reports - see the performance of all of your marketing efforts and understand the sales associated with loyalty members, communication engagement and database growth in your monthly report.

COMING SOON - TALKBOX ANALYTICS

TalkBox Analytics will help you measure the ROI on all your TalkBox loyalty marketing efforts.

For more information:

If you would like assistance using the fields and activating automated communications please contact our support team by click below or scanning the QR code:

[Get in touch >](#)

[Support Centre >](#)



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