

Loyalty Program Setup Checklist

Launch a live, working loyalty program — for your business or a client's — in under an hour.

Bonus value: \$27

Step 0 — The offer math (do this before touching any software)

A loyalty program is a discount you give your best customers *in exchange for changed behavior*. Get the math right and it costs ~10% of revenue it directly creates.

Worked example (barbershop):

- Haircut price: **\$30**
- Program: 1 visit = 1 point · **10 points = 1 free haircut**
- Cost to the business: \$30 given away per \$300 spent = **10% giveback** — but only for customers who completed ten visits.
- Payoff: if the program moves a monthly regular to one extra visit every other month, that's +\$180/yr per regular against ~\$36/yr of giveback.

Rule of thumb	Why
First reward reachable in 4–6 visits (or make reward #1 smaller: "5 points = free drink upgrade")	If the finish line looks far away, nobody starts running. Early wins hook people.
Reward value ≈ 8–12% of the spend needed to earn it	Below 8% feels stingy and gets ignored; above 15% eats margin without adding motivation.
Reward = your own product/service , never cash or discounts on bills	A "free haircut" costs the business ~\$8 in real terms but is worth \$30 to the customer.
No point expiry in year one	Expiring points generate exactly one emotion: resentment. Add expiry later only if liability grows.

Step 1 — Design decisions (10 min)

- ☐ What earns a point? (per visit is simplest; per \$10 spent works for cafés/restaurants)
- ☐ What's the reward, and at how many points? (write it as a sentence: "Every visit = 1 point. 10 points = free haircut.")
- ☐ Optional early win at the halfway mark? ("5 points = free product sample / drink upgrade")
- ☐ Program name — keep it obvious: "[BUSINESS] Rewards"
- ☐ Who redeems at the counter, and how do they verify? (decide now, brief staff later)

Step 2 — Build it in Rewardsly (20 min)

- ☐ Create the **Store**: business name, location, timezone, and the hosted store URL

- ☐ Upload the business logo so the customer-facing page is properly branded
- ☐ Create the **Reward**: points required + reward description (the sentence from Step 1)
- ☐ Set the points-per-visit earn rule
- ☐ Connect the **autoresponder** (or SMTP) so every signup lands on the email list — this list is half the value of the whole program
- ☐ If selling gift cards too: connect the **payment gateway** (PayPal/Stripe) now, same sitting
- ☐ Get the **signup QR code / link** for the store

Do not skip the test: before showing anyone, run the full loop yourself on your own phone — scan the QR, sign up as a customer, earn a point, redeem a reward at the threshold. If any step confuses you, it will lose customers at the counter. Fix it now.

Step 3 — Launch week (the part most people skip)

A loyalty program nobody hears about is a settings page. Launch it like it matters:

3a. Staff one-pager

PRINT THIS AND PUT IT BY THE TILL

OUR LOYALTY PROGRAM — WHAT TO SAY

The 15-second version (say it at checkout, every time):

"By the way — we've got a rewards program now. Scan this QR, takes 20 seconds, and today's visit already counts. [X] visits gets you [REWARD], free."

If they ask how it works:

"Nothing to download — it lives in your phone's browser. You scan, you earn a point each visit, the reward's automatic."

To redeem: customer shows the reward screen → [VERIFY STEP] → give the reward, congratulate them loudly enough that the queue hears it. 😊

3b. Make it visible

- ☐ QR signage at the till + one at eye level near the door (print the store QR big — A5 minimum)
- ☐ Announcement email to the existing customer list (use your Gift Card Promo Swipe File formats — swap in the loyalty offer)
- ☐ One social post + one story on launch day; pin the post
- ☐ Staff briefed on the 15-second spiel (read it aloud together once — it takes two minutes and doubles signups)

Step 4 — First 30 days: watch, then tweak

Metric (check weekly in Analytics)	Healthy sign	If it's low...
Signups per week	Growing week over week	Staff aren't saying the spiel, or the QR isn't at the till. Fix visibility first — it's almost always this.
% of customers who scan when asked	Roughly a third or better	The ask is too long. Cut it back to the 15-second version, nothing more.
First redemptions	Within 4–8 weeks	Threshold too high — add a smaller early reward at 4–5 points.
Email list growth	Mirrors signups	Autoresponder not connected properly — re-test the integration.

The week-4 move: email everyone who signed up but hasn't visited since: "You're already [X] points in — [Y] more and [REWARD] is yours." That one email is the highest-ROI message the program will ever send.

Step 5 — If you're doing this for clients

- ☐ Build the whole thing in a demo **before** the sales meeting (their name, their logo) — showing beats telling
- ☐ Deliver Steps 0–3 as your setup fee; run Step 4's weekly check + the monthly promo email as the retainer
- ☐ Send the owner a 5-line monthly report: signups, active members, redemptions, list size, next month's promo
- ☐ Upsell path: once loyalty is humming, launch their gift cards with the 7-day sequence in the swipe file

The master checklist (print me)

- ☐ Offer math done — reward $\approx$ 8–12% giveback, first reward within 4–6 visits
- ☐ Program sentence written ("Every visit = 1 point...")
- ☐ Store created + branded · reward configured · earn rule set
- ☐ Autoresponder connected (+ payment gateway if gift cards)
- ☐ Full customer loop tested on your own phone — signup → earn → redeem
- ☐ QR signage printed and placed at till + door
- ☐ Staff one-pager printed; spiel rehearsed once, out loud
- ☐ Launch email sent + social post pinned
- ☐ Weekly metric check in calendar (4 weeks)
- ☐ Week-4 "you're already X points in" email scheduled