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# Forrester Advisory On Preparing For The Next Generation Of Loyalty

## Introduction

Through a session on the next generation of loyalty, Forrester's thought leadership and deep market knowledge will set the stage for how firms must mature their approach to customer loyalty to drive retention, engagement, and advocacy. Forrester will reveal how strategies that rely purely on loyalty programs offering points and discounts miss an opportunity to drive deeper engagement through emotional loyalty.

Forrester will show how this will affect you and your organization; establish the vision for the next three to five years; provide concrete indications and proof points for how the initiative will develop over time; and inspire action. This workshop will help you understand the current state of your loyalty strategies and create a cohesive vision for how that strategy will retain and grow customer relationships going forward.

### Leverage Forrester's understanding of customer loyalty to:

1. Understand the technologies and trends that will affect your future state.
2. Validate your current practices and future plans against best practices.
3. Evangelize these ideas within your organization with Forrester's thought leadership.

## Session Approach

Through Forrester's advisory engagement, you will receive critical guidance on elevating your loyalty program. Forrester's approach will consist of the following:

- › **Lead a preparation call.** Forrester will lead one 30-minute meeting via teleconference to define session objectives, gain further understanding of your current direction and organization, and finalize the agenda.
- › **Prepare the content.** Forrester will aggregate existing research, data, and analyst expertise to develop a tailored facilitated session.
- › **Conduct the session.** Forrester will provide thought leadership on preparing for the next generation of loyalty and a vision for how this will transform your organization.

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## Typical Session Agenda

9:00-9:15 a.m.	<b>Introductions and expectations:</b> Review the agenda and objectives for the day.
9:15-10:30 a.m.	<b>The current state and emerging trends in loyalty:</b> <ul style="list-style-type: none"><li>• Review data from Forrester's Loyalty Marketing Benchmark and Consumer Technographics® surveys.</li><li>• Explore how companies are currently tackling customer loyalty, the key challenges they face, and the link between customer experience and customer loyalty.</li><li>• Discuss the emerging trends Forrester sees in the loyalty space.</li></ul>
10:30-10:45 a.m.	<b>BREAK</b>
10:45 a.m.-12:00 p.m.	<b>Reviewing your current loyalty approach:</b> <ul style="list-style-type: none"><li>• Review and discuss the strengths and opportunities of your current thinking on loyalty.</li><li>• Group discussion: How will your organization approach rewarding and recognizing customer loyalty across the organization? What will be the key measures of success?</li></ul>
12:00-1:00 p.m.	<b>LUNCH</b>
1:00-2:00 p.m.	<b>Best practices for building a world-class loyalty strategy:</b> <ul style="list-style-type: none"><li>• Review Forrester's best practices.</li><li>• Group discussion: Where does your organization currently embody best practices? What are key areas of opportunity?</li></ul>
2:00-2:15 p.m.	<b>BREAK</b>
2:15-3:15 p.m.	<b>Case studies:</b> <ul style="list-style-type: none"><li>• Review loyalty case studies across industries.</li><li>• Group discussion: How do these case studies apply — or not apply — to your organization? What are the key takeaways?</li></ul>
3:15-4:00 p.m.	<b>Wrap-up and next steps:</b> <ul style="list-style-type: none"><li>• Where do you go from here? Discuss next steps.</li><li>• Aggregate opportunities and challenges.</li><li>• Create a road map of priorities.</li></ul>