COUP DE POING

THE PRACTICAL WHITE PAPERS

B2B Loyalty: The brief that moves your project forward

A working white paper to align sales, marketing, finance, and IT: seven decisions, a responsibility matrix, and a launch sheet to complete.

DECIDE. ALIGN. ACT.

Method, workshop and launch checklist

A working document for your next team workshop.

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Your working framework

- The right beneficiary is not always the buyer.
- A rule must cover assets, duplicates, and account changes.
- A pilot is judged on usage and contribution, not just on registrations.

Inside this guide

01 Mapping who buys, chooses, and uses

02 Choose an observable behaviour

03 Write the rule before drawing the catalogue.

04 Think in terms of contribution, not just revenue.

05 Linking data to the actual process

06 Test exceptions with support

07 Establish a decision-making rhythm.

08 Your partner network planning workshop

09 What to prepare before acceptance testing

10 Decide whether to expand after testing the full journey

01 Mapping who buys, chooses, and uses

In a client company, the buyer, the influencer, and the user can be three different people. Giving an advantage to the wrong person creates friction, even if it's high-value. Distinguish between the account to which the performance is linked and the beneficiary authorized to receive a reward. Check the gift policies of the companies involved before choosing the rewards.

• List the roles and their rights: company account, administrator, participant.

• Define what happens in the event of a departure, an account change, or a duplicate entry.

02 Choose an observable behaviour

"Increase customer loyalty" doesn't allow for the creation of a rule. Choose a primary action: expand the product range purchased, increase order frequency, or reactivate inactive customers. Describe the initial target population, the reference period, and any exclusions. Separate price variations from actual changes in purchases to avoid rewarding a purely price increase.

• Write: for which audience, what additional action, and over what period?

• Document the starting value and the source that will allow the change to be measured.

03 Write the rule before drawing the catalogue.

Specify the triggering event, the validation deadline, and the point value. A canceled invoice, a credit note, or a partially delivered order should produce a consistent response. Test the rule on a small, medium, and large account: each should understand the first achievable tier. The catalogue comes next, with a full cost that includes delivery and support.

• Formalize the earning, validation, expiration, and cancellation on the same sheet.

• Present three progression simulations, without promising an unattainable reward.

04 Think in terms of contribution, not just revenue.

Model fixed costs, engagement, and actual rewards consumed separately. Vary the activation rate, point consumption, and incremental margin. The high-usage scenario must remain financially viable. A budget reserve does not replace a clear rule on acquired rights: do not retroactively change the conditions to compensate for a poor forecast.

• Develop three scenarios and assign a responsible party to each hypothesis.

• Have the processing of reward commitments validated by the finance department.

05 Linking data to the actual process

For each event, identify the source of truth: CRM for account identity, ERP for the invoice, platform for points. Define the reconciliation identifiers and the exchange frequency. A correction must be traceable and repeatable without double credit. Limit personal data to the defined uses and validate the legal bases and appropriate retention periods.

• Test a merged account, a corrected invoice, and a delayed synchronization.

• Display the update date and the reason for a pending validation to the participant.

06 Test exceptions with support

The pilot must include several customer and sales representative profiles. Observe their ability to register, understand the rules, and obtain an initial reward without excessive support. Prepare support responses before launching the programme: the stated timeframe also applies to complex cases. Do not conclude that the programme is a success based solely on the number of registrations.

• Define the pilot exit criteria: access, data, commands, deadlines, and support.

• Maintain an incident log with severity, responsible party, and proof of resolution.

07 Establish a decision-making rhythm.

Monthly, track active participants, eligible actions, cost, and incidents. If possible, compare behaviours to those of a comparable population; top customers may enroll spontaneously and skew a raw comparison. Decide on a single priority per review: simplify access, improve the rule, or adjust the facilitation.

• Document a decision, its responsible party, and its reassessment date.

• Distinguish the programme's activity from the economic impact attributable to the programme.

08 Your partner network planning workshop

Bring together the decision-makers, those who use the system, and a representative from the target audience. For each topic, document a decision, a responsible party, and the remaining issues to be resolved.

Subject	Work session	Expected deliverable
Target audience and roles	Draw companies, establishments, contacts, and beneficiaries.	A map of roles and permissions, validated by field teams.
Action and proof	Choose a priority action and the data that supports it.	A rule illustrated by an accepted transaction and a rejected transaction.
Earning rules and budget	Simulate the gains on profiles with different potential.	An initial accessible benefit and an estimated cost based on several participation levels.
Data and Exceptions	Replay duplicates, returns, unknown references, and account changes.	A set of expected scenarios and a responsible party for each anomaly.
Engagement and measurement	Prepare invitations, initial usage, follow-up, and evaluation.	A timeline, defined indicators, and a decision date for the pilot.

09 What to prepare before acceptance testing

• A repository of accounts and products, with the identifiers used for transactions.

• A dated version of the programme rules, earning rates and conditions that participants can understand.

• Examples of point and order movements, including returns and corrections.

• Operational responsibilities: imports, validation, engagement, support and rewards.

• A measurement sheet specifying the population, period, source, and comparison method.

10 Decide whether to expand after testing the full journey

The pilot must allow you to observe data quality, initial use, understanding of the rules, and reward processing. Compare the results to the agreed-upon criteria and categorize any difficulties according to their cause: data, promise, access, or execution. Correct any flaws that prevent you from explaining a balance or maintaining a benefit before expanding the user base. Initial registrations alone are not sufficient to draw conclusions.

Your next decision

Priority action:

Owner and review date:

Evidence required:

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