

Loyalty Program Audit Checklist

Change doesn't have to wait for next year's budget. Here's how a marketing team can build loyalty momentum in the next 30 days:.

1. Strategic Alignment

- Does the program clearly support current growth strategy?
- Is the value proposition still relevant to primary customer segments?
- Is there a defined competitive position your program can own?
- Does the loyalty narrative match the brand's current positioning?
- Are program goals documented and tracked at the executive level?

2. Customer Insight and Targeting

- Do you have fresh data on what motivates your most profitable customers?
- Have segment behaviors evolved in ways the program no longer reflects?
- Are rewards and earning paths built around what customers actually use?
- Does the program meaningfully address the top friction points in the experience?
- Are inactive or low value members identified with tailored actions?

3. Program Structure and Value Mechanics

- Is the earning structure simple enough to be understood quickly?
- Are redemption paths easy to reach without frustration?
- Does the program drive profitable behavior instead of subsidizing existing habits?
- Are tiers calibrated so members can progress without feeling blocked?
- Are breakage and liability managed without weakening perceived value?

4. Experience and Engagement

- Does enrollment feel integrated rather than added on?
- Are onboarding communications clear about how to earn and what matters?
- Is engagement maintained outside of promotions and discount periods?
- Do digital and in-person experiences reinforce loyalty moments consistently?
- Are customer service teams trained to deliver loyalty benefits reliably?

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5. Technology and Data Infrastructure

- Are core platforms synced and accurate?
- Can the system track behaviors beyond purchases?
- Are reward balances updated in a timeframe that feels immediate?
- Does reporting provide visibility into cohort performance and retention trends?
- Can the program support test and learn without heavy manual work?

6. Financial Performance and Investment Efficiency

- Are reward costs predictable and within sustainable ranges?
- Do behavioral shifts justify program investment?
- Is discount reliance increasing year over year?
- Are there clear metrics for incremental lift vs non-incremental activity?
- Does finance agree with the program's reporting and assumptions?

7. Governance and Optimization Readiness

- Is there a clear owner responsible for performance?
- Are optimizations planned on a defined cadence or only made reactively?
- Are cross-functional teams aligned on what success looks like?
- Is there a backlog of enhancements informed by data?
- Are partnerships evaluated for relevance and fit?

8. Partner and Ecosystem Value

- Do partners contribute real value members can recognize?
- Are partner offers aligned with your key segments?
- Is partner performance reviewed with clear criteria?
- Do partnerships reduce program cost or expand reach?
- Is member data handled with the right controls?