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## TRAINING SERIES MANAGING CUSTOMER LOYALTY

ORLANDO, FL JANUARY 14-15

CHICAGO, IL FEBRUARY 5-6

SAN FRANCISCO, CA FEBRUARY 25-26

To register visit [www.MarketingPower.com/fiscustomerloyalty](http://www.MarketingPower.com/fiscustomerloyalty)  
or call 800.AMA.1150.



## MANAGING CUSTOMER LOYALTY

AMERICAN MARKETING ASSOCIATION  
TRAINING SERIES

ORLANDO JAN 14-15 | CHICAGO FEB 5-6 | SAN FRANCISCO FEB 25-26

Customer loyalty is one of the most powerful weapons an organization has in its strategic arsenal. However, most companies do not fully understand the value of customer loyalty or realize its potential for enhancing customer relationships. This two-day hands-on session will provide you with the information and tools to fully utilize customer loyalty and increase bottom-line results.



# MANAGING CUSTOMER LOYALTY

This course was approved by the MRA for the following PRC Contact hours:

14 HOUR ANALYSIS | 1 HOUR SAMPLING

Customer loyalty should be a key strategy your organization uses to drive continual business and create brand advocates. However, many companies do not realize the full potential of customer loyalty research. This two-day hands-on session will provide you with the information and tools to fully utilize customer loyalty.

## BENEFITS OF ATTENDING

- Create and analyze loyalty segments
- Understand how to acquire meaningful customer loyalty information
- Design and manage your customer loyalty information process
- Define and prioritize customer segments based on their loyalty profile
- Assess the competition; determine which competitors are threats, and how to develop appropriate responses to competitive actions
- Construct and manage action plans for making positive changes based on your customer loyalty information
- Identify and manage business risks associated with your company's customer loyalty segments
- How to drive the behaviors that distinguish your loyal customers from your vulnerable customers
- Differentiate between marketing mix elements that can be used to migrate customers from one loyalty segment to another
- Define the ROI from loyalty and behavioral change

## LEAVE THE EVENT WITH

- Examples and techniques that address B2C, B2B, product-oriented businesses, and service oriented businesses
- Tools that can be used to execute this work in your business
- Take home Excel-based tools to help you perform the techniques learned in the session
- A bibliography of prominent articles on each topic area

## WHO SHOULD ATTEND

- Sales and marketing executives
- Strategic planning and business development executives
- Researchers responsible for loyalty information
- Managers of call centers or any other customer service function
- Anyone involved with the implementation, management, or use of CRM information

## ABOUT THE INSTRUCTOR

WILLIAM ALDY KEENE has worked in the field of customer loyalty for over 17 years. He is currently a partner in The Loyalty Research Center, an organization that specializes in the design, analyses and management of customer relationship and customer loyalty information systems. Mr. Keene has conducted research and consulted in the areas of new products, product design testing, advertising evaluation, price sensitivity, customer satisfaction, and customer value analysis.

## DAY 1 8:30 AM – 5:00 PM

CONTINENTAL BREAKFAST 8:00 – 8:30 AM

### OVERVIEW

- Overview of the two-day session
- What are your expectations?

### WHAT IS LOYALTY?

- Why loyalty is important
- How is loyalty defined in your business or organization?
- The common ways to define loyalty
- A comparison of satisfaction and loyalty

### MEASURING LOYALTY

- Forming the model into questions
- Keys to a successful loyalty survey

### PUTTING IT ALL TOGETHER

- Building the Loyalty Profile
- Validating the Loyalty Profile
- Who are the loyal customers?
- Who are the vulnerable customers?

### EXERCISE: BUILDING A LOYALTY PROFILE FOR YOUR BUSINESS

LUNCH 12:00 – 1:00 PM

### DESIGNING A SAMPLE AND COLLECTING THE INFORMATION

- Who should you interview to determine the Loyalty Profile?
- B2B and B2C considerations
- How many interviews need to be obtained for the results to be meaningful?
- Different options for collecting information

### BUILDING A MODEL OF EXPERIENCES THAT COULD AFFECT CUSTOMER LOYALTY

- The common hierarchical structures used to model loyalty
- How to build those models for your organization
- Measuring that model

### EXERCISE: DESIGNING A LOYALTY MODEL FOR YOUR BUSINESS

### LOYALTY ANALYSIS

- How do the loyalty segments differ in how they evaluate experiences with your organization?
- Determining the experiences that are critical to the different loyalty segments

### LOYALTY MIGRATION

- What are the issues that make these customers loyal or vulnerable?
- Can the loyalty profile be changed?

## DAY 2 8:30 AM – 4:00 PM

CONTINENTAL BREAKFAST 8:00 – 8:30 AM

### LOYALTY PROGRAMS

- What are loyalty programs?
- What impact can they have on loyalty?
- Different types of loyalty programs
- Measuring the impact of loyalty programs

LUNCH 12:00 – 1:00 PM

### TRACKING THE SUCCESS OF THE CHANGE

- Effort metrics
- Outcome metrics
- Financial metrics

### MAKING ADJUSTMENTS

- Leading indicators
- Preparing the organization for the need for adjustments

### INTEGRATING LOYALTY INFORMATION

- Using other information in the organization to update loyalty profiles
- Creating a loyalty scorecard

## LOCATIONS

### JANUARY 14-15

ORLANDO, FL  
Orlando Marriott Downtown  
400 West Livingston Street  
Orlando, FL 32801  
Phone: 407.843.6664  
www.orlandomarriott.com

### FEBRUARY 5-6

CHICAGO, IL  
Gleacher Center  
450 N Cityfront Plaza Drive  
Chicago, IL 60611  
Phone: 312.464.8787  
www.gleachercenter.com

### FEBRUARY 25-26

SAN FRANCISCO, CA  
Sir Francis Drake Hotel  
450 Powell Street  
San Francisco, CA 94102  
Phone: 415.392.7755  
www.sirfrancisdrake.com

## PRICING

MEMBER	\$1475
NON-MEMBER	\$1725

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## EARLY REGISTRATION DEADLINES\*

ORLANDO	DECEMBER 15
CHICAGO	JANUARY 5
SAN FRANCISCO	JANUARY 26

\*Please add an additional \$100 to price after early registration deadline(s).

## TO REGISTER VISIT

www.MarketingPower.com/tscustomerloyalty or call 800.AMA.1150.