



Webinar - Customer Loyalty

April 2024



Why a Loyalty Club?

- Clubs are a great way to grow your customer base and encourage loyalty from your existing customers
- Add value to the shopping experience and encourage repeat business whilst increasing your foot traffic and sales
- Loyal customers spend more, stay longer and recommend your business to others
- Offer affordable and timely discounts / bonuses / specials
- Boost your marketing opportunities and target the right customers
- Keep your customers involved, informed and impressed with mail outs, emails or text messages
- Find your top customers or even those who have stopped visiting
- Create your own personalised vouchers for impact
- Produce vouchers only when required and keep track of them
- Create plastic loyalty cards containing your business details which promote your business wherever the customers' wallet / purse goes



Deciding on Club options

- Choose to run a Pharmacy Loyalty Club or specialty clubs such as a Beauty Club, Baby Club, Natural Health Club, etc.
- Decide on the club format – dollars, items, points or “coffee card”
- Decide which products to include in each club
- Decide whether to include discounted items and / or specials
- Decide on the reward – a gift voucher? a product? a discount?
- Should the reward be instantaneous or available on the next visit?
- Decide on the level of spending before the reward is issued
- Should you be handing out plastic loyalty ID cards?



Suggested Pharmacy Wide Club

- This is probably the easiest and best club to setup and run ...
- Set the level of spending at a realistic value - maybe \$120 to get a \$10 voucher (8.33%) or \$80 to get a \$5 voucher (6.25%)
- Maybe set two levels to encourage up selling:
 - Spend \$80 and get a \$5 voucher
 - Spend \$120 and get a \$10 voucher“Just spend another \$40 and double your reward”
- Exclude Prescriptions, Magazines, NZ Post, Film Processing, Hire
- Exclude discounted items but include specials
- Train your staff to capture customer's name, address, email, mobile phone number as part of the POS sale process
- Issue plastic loyalty ID cards to customers
- Get a voucher designed which is printed at the time of the customer reaching the bonus (via the receipt printer)
- Set the voucher expiry to 6 months maybe

Customer Loyalty Cards

- 80% of your business will come from 20% of your customers
 - It's harder to gain a new customer than to keep an existing one
 - Use for: Marketing, Advertising, Clubs, Laybys
 - Don't get thrown away like a cardboard coffee card
 - Professional looking cards
 - Standard credit card size
 - Barcoded for fast client selection
 - Multi or Single colour
 - Double sided
 - Use your colours, logos, etc.
-
- Costs varying depending on quantity ordered, colours and design



Staff Security Cards

- Give staff their own security card to help prevent unauthorised use
- Each card has a barcode (number not shown) so even the salesperson / user does not know their password
- Great for part time / temporary staff
- Uses standard barcode scanner
- Professional looking cards
- Standard credit card size
- Multi or Single colour
- Double sided
- Can also use QR codes
- Costs varying depending on quantity ordered, colours and design



Example Pharmacy Wide Club

- From the main menu select 5.Clubs then 1.Maintain Clubs

Name

Print on receipt POS prompt Permit duplication HO compulsory Opening points

Skip levels Bonus resets level Bonus always free Don't update address Opening value

Hide Dont count disc. items Dont count specials Allow merge

Rx points Club discount Sale threshold Purge time Proximity %

Include all products No Promotional Mail Notes

Include Rxs

Levels and bonus settings next page (F11)

Collection type	Excl
Departments	<input checked="" type="checkbox"/> D & P, EziPay, NZ Post, Service Fees

	Value	Items	Pts.	Default bonus product	Bonus description
Lev. 1	80.00			VIP Voucher \$5.00	Spend \$80 and receive a \$5 voucher
Lev. 2	120.00			VIP Voucher \$10.00	Spend \$120 and receive a \$10 voucher
Lev. 3					
Lev. 4					
Lev. 5					
Lev. 6					
Lev. 7					
Lev. 8					

Bonus near message

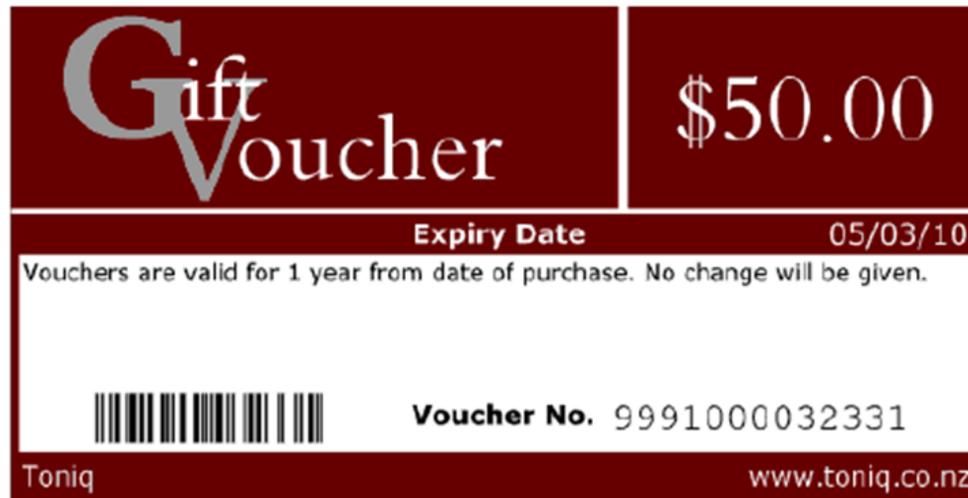
Setting up Voucher / Flexisign

- There are a few steps to setting up a Voucher / Flexisign:
 - Ensure you have a windows receipt printer driver loaded and working on each POS workstation
 - Create / design a Flexisign (and test that it prints correctly)
 - Create a Voucher template
 - Setup the Voucher product
 - Link the voucher template to the voucher product
 - Setup your club to issue the bonus / voucher (if a voucher is your club reward)



- Note: Vouchers / Flexisigns are separate, chargeable modules

Example Vouchers / Flexisigns



Example Vouchers / Flexisigns



Vitamin Club Bonus Voucher



Example Vouchers / Flexisigns

Pay less @ Tonic

**SUDAFED PE D&N
Relief Sinus 24pk**

\$ 26.⁹⁹

2207273

**SUDAFED PE D&N Relief
Sinus 24pk**

Why Pay **\$26.⁹⁹**
\$0.00
2207273

**SUDAFED PE Nasal
Decong Tab 10mg 24s**

\$24.99

life
Pharmacy



Entering Customer Details

- In POS press F5 Client, select the client then F2 Edit Client

General details		Extra details	
Surname	Mouse	Account name	
Title	Mr	Sex	M
First names	Mickey	Don't ask to link to account <input type="checkbox"/>	
Address	67 Riccarton Road	Club card details	
Address	Riccarton	Club cards	Loyalty Club (22481) RESTRICTED MEDICINE (22482)
Address	Christchurch	Share card	
E-mail address	support@toniq.co.nz	Other details	
Post code		Customer loyalty card	251
Phone	033410195	National loyalty card	
Date of birth	23/09/1966	Drivers licence	
Mobile	021344437	Other card	
Fax			
Note			
Prompt	<input type="checkbox"/>		
POS note			
Prompt	<input type="checkbox"/>		
No faxes	<input checked="" type="checkbox"/>		
No promotional mail	<input type="checkbox"/>		

- To scan the unique barcode, press F9 Goto Other, scan the barcode and press F12 Accept



Joining a Customer to a Club

- In POS press F5 Client, select the client, press F11 Join Club
 - Note: the client must first have an address

- Select club from the list
- Check with the customer in regards to promotional mail

Join
Club
F11

Should the new card replicate the customers promotional communications options?
Yes
No

1 elevit
2 Loyalty Club
3 RESTRICTED MEDICINE

- Alternatively, in POS press F5 Client, select the client, press F2 Edit Client, check the name, address, email, phone, etc.
 - Press F3 New Card and select the club from the list
 - Press F12 Accept twice to return to POS

Viewing Customer Club History

- In POS press F5 Client, select the client, select the desired club with F6 or F7 or F8

Club Card	Club Card	Club Card
F6	F7	F8

Club Cards	Bonus
F6 BEAUTY CLUB	
F7 CONTACT LENS	
F8 Pharmacist Only Medicin	

Club Card		Client	
BEAUTY CLUB		Mr Clive Davidson 4 Murchison Drive Dyce	
Status			
Start 24 Jul 2007			
ID 2084 Mrs Sosen Sullos (U)			

Balance	12 mth	All	Bonus balance: Next level 1	Value	Items	Points
Value	\$52.48	\$279.87		\$79.87		
Items	5	11				
Points						

Value	Items	Points	Status	Description
			L1	\$200 BEAUTY GIFT VOUCHER
			L2	
			L3	
			L4	

Date	Seller	Invoice	Qty	Description	Price	Points
18 Feb 12	CAUMBUS	225228	1	M'CARE Nail Shaper:	6.79	0
19 Oct 11	Seruh Billin	199561	1	SAX L/S Emmy Award	5.00	0
14 Oct 11	Lau	198724	1	NATIO Top & Base Coat	14.50	0
29 Apr 11	Suiluy	159579	1	M'CARE Nail Shapers Cushioned Pk2	6.19	0
29 Apr 11	Suiluy	159579	1	JF FE Secret Weapon Style Cr. 113g	20.00	0
11 Mar 10	Deves	64189	1	Evolu Cert Org Rosehip Oil 30ml	21.00	0
11 Mar 10	Deves	64133	1	BEAUTY GIFT VOUCHER	0.00	0
11 Mar 10	Deves	64133	1	CORAL Nail Enamel Glam Pink	6.99	0
12 Jan 10	Dottmor	50747	1	REVL BLUSHER PINCH ME PLUM FLUSHED 315	5.00	0
14 Dec 09	Dottmor	44194	1	RICCI Ricci EDP 30ml	86.00	0
12 Aug 09	Cidnag	12639	1	SHE Nail Varnish Diamond 15ml	12.00	0

Redeeming Vouchers

- Recall the Client in POS to see any outstanding balance
- After item(s) have been scanned press F12 Tender
- Select the Customer Voucher Key
- Scan the barcode on the Voucher or press the [Spacebar] to get a list
- Once selected confirm the amount by pressing [Enter]

Client (Vch 15.00)
Lewis A L
19 Jarvis Road
Hastings

Voucher	6.50	\$6.50
Voucher (9991000013595) Current bal. \$100.00		Balance Owing

Creating a Mail List

➤ From the main menu select 5.Clubs, 3.Maintain club cards in bulk

➤ Select Club and enter selection criteria (further options on page 2)

➤ Maybe use anyone who has purchased 2 items in the last year

➤ Check promotional mail flags

➤ Press F12 Accept

Card criteria	
Card name	
Club	Loyalty Club
Note	

Transaction criteria			
Period	01/01/2011	to	/ /
Value		to	
Items	2	to	
Points		to	

Allow prom. mail	<input type="checkbox"/>	Allow prom. faxes	<input type="checkbox"/>
Allow prom. texts	<input type="checkbox"/>	Allow prom. Email	<input type="checkbox"/>

Creating a Mail List (continued)

- Use F2 Edit List to ADD, REMOVE, or EDIT customers to / from the existing list
- Use F3 Sort list and choose by 1.Tx Value
 - You could also choose to sort by 2.Tx items or maybe the current value / items (which is the customers current level towards the bonus)
 - Note: Tx stands for 'transaction'
- Use F8 Print Labels or F9 Print List
- Chose the number of customers to print

Select option

Add more cards in bulk
Remove cards in bulk
Edit list card by card

Select sort option

Name
Value
Points
Items
Level
1 Tx value
2 Tx items
3 Tx points
Sort key
Club

331 club cards selected.

1 Print all
2 Select beginning club card
3 Print selected and following
4 Print first ...
5 Cancel

Contacting Customers

- From the main menu select 4.Contacts / clients, F7 Bulk Edit Clients
- Select criteria:
 - Maybe use anyone who has purchased 2 items in the last year

- Select the Club
- Tick 'Allow promotional texts'
- Press F12 Accept
- Add / Remove people from the list using F2 Edit List
- Sort the list using F3 Sort
- To send a Text Message (or email) press F9 Contact Clients

Period	01/04/23	to	/ /
Value		to	
Items	2	to	
Product			
Department			
Group			
Division			
Manufacturer			
Promotion			
Catalogue			
Product type			
Just done			

Name			
Note			
Promotions note			
Address			
Birthday	/	to	/
Age		to	
Male only	<input type="checkbox"/>	Female only	<input type="checkbox"/>
In club	Customer Club		
Incl. hidden cards	<input type="checkbox"/>	Has corporate card	<input type="checkbox"/>
Not in any club	<input type="checkbox"/>	Corporate customers only	<input type="checkbox"/>
Allow prom. mail	<input type="checkbox"/>	No promotions note	<input type="checkbox"/>
Allow prom. texts	<input checked="" type="checkbox"/>	Has mobile number	<input checked="" type="checkbox"/>

Sending a Text Message

(continued from previous slide)

- Press F7 Create Message
- Type up a Text or Email (or both)
- Press F9 Send Message
- Select Email or Text (or a combination)

Note: Charges may apply

Txt message

Sender: TONIQ Pharmacy Ltd.

Hi ^FRSTNM;; Happy birthday month!

To celebrate we have a \$10 Voucher waiting for you instore. Please drop by to collect :)

Send Msg	Other	Find Note	Accept Detail
F9	F10	F11	F12

Select send messages option

- 1** Email only
- 3** Txt only
- 5** Email else Txt
- 7** Txt else Email

Toniq Help and Knowledge Base

- Further information can be found in the Toniq Knowledge base:

[Toniq.nz/help](https://toniq.nz/help)

- Questions?

A person wearing a white lab coat is shown from the chest down, sitting at a desk and typing on a laptop keyboard. The scene is dimly lit with a teal-green color overlay. A pair of glasses is visible on the desk to the left of the laptop. The overall atmosphere is professional and clinical.

 **TONIQ**