

From Campaigns to Conversations

Cultivating Lifelong Loyalty with Mobile Moments

OCTOBER 2025



Your Mobile Loyalty Experts

PRESENTERS



Vincent Sgro
VP, Alliance Solution
Leader at Merkle



James Riess
SVP General Manager,
Loyalty at Merkle



Emma Patterson
Sr. Alliances Director,
Amer at Airship



David Adler
Director, Loyalty
Management Product
At Salesforce

What We'll Cover Today

- Share how your brand can put the consumer at the center of your loyalty experience with mobile moments
- Discuss some of the powerful loyalty use cases that can be unlocked through mobile-first approach
- Highlight the breakthrough integration between SFLM and Airship that will accelerate time to value

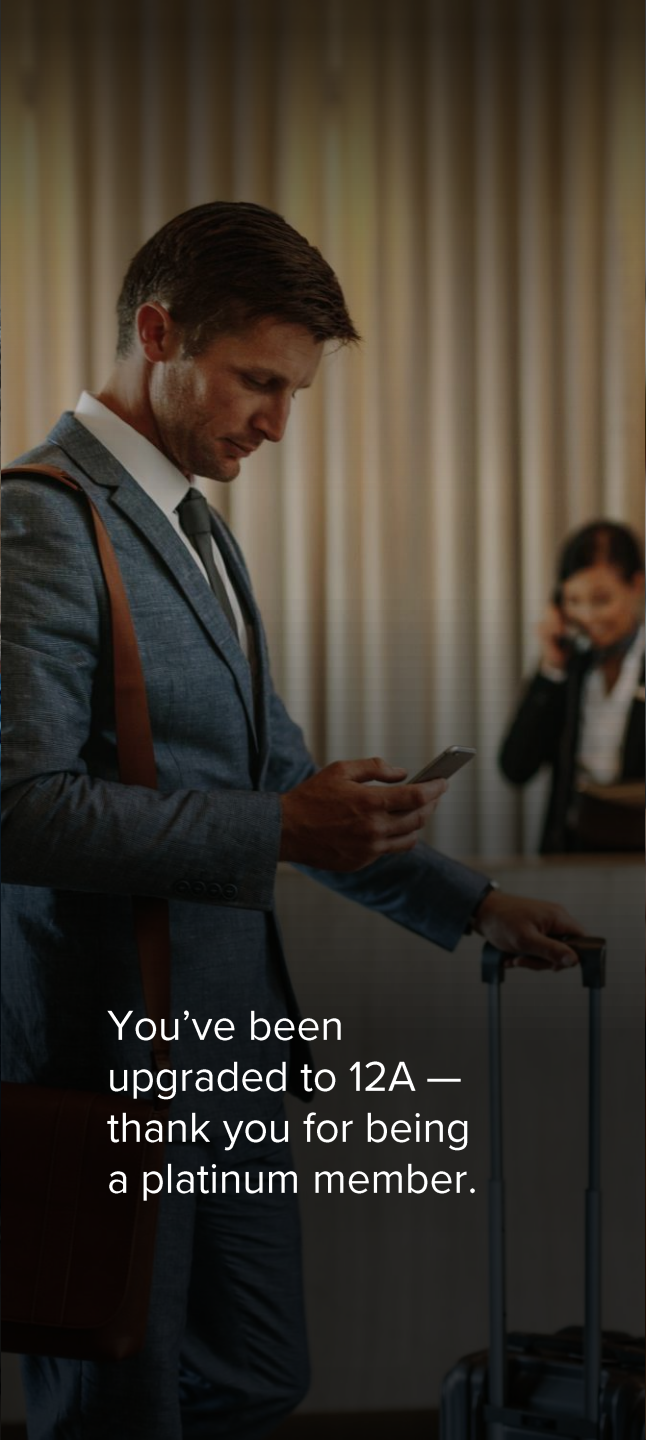
The Power of Mobile Moments

A woman with dark hair, wearing a grey blazer over a white top, is smiling and looking down at her smartphone. The background is a bright, slightly blurred outdoor setting.

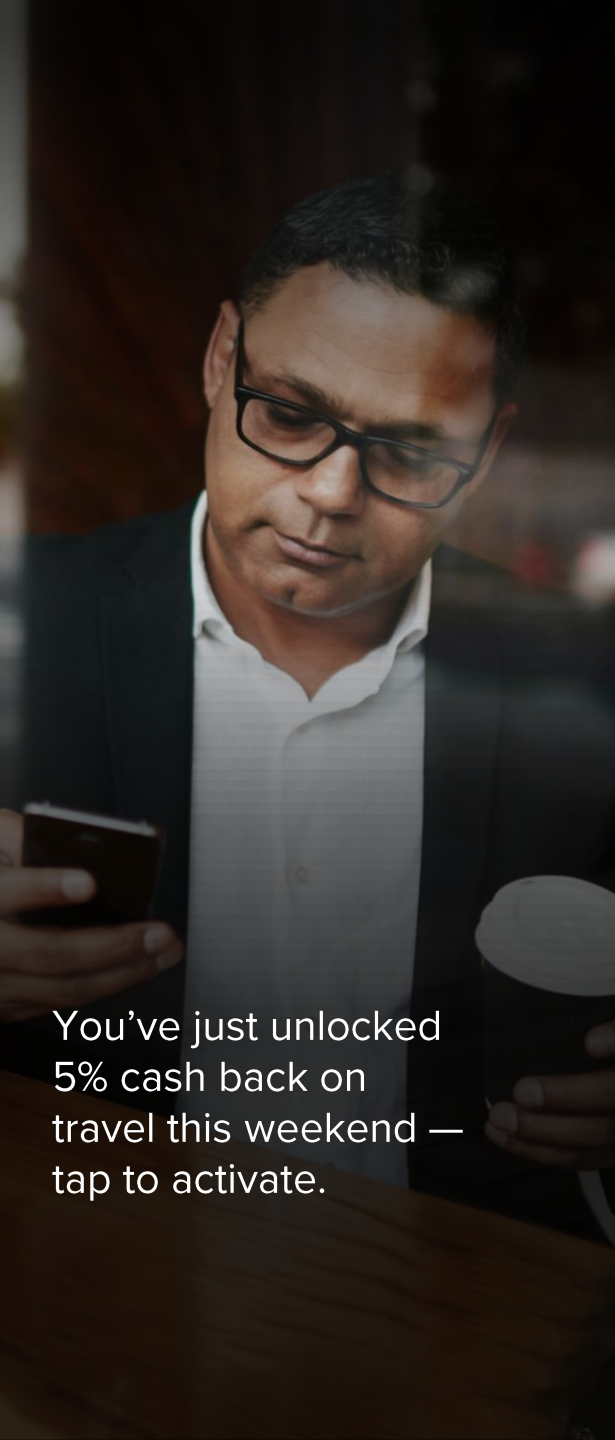
Two blocks away?
Double points if
you grab lunch
before 1 p.m.

An older woman with short grey hair and glasses, wearing a blue button-down shirt, is smiling and looking into an open cardboard box. She is holding a pink garment. The background shows a kitchen with shelves and a lamp.

Congrats Maya —
you've unlocked
Gold status. Early
access starts now.

A man in a grey suit and tie, carrying a brown shoulder bag, is looking down at his smartphone. He is standing in what appears to be a hotel lobby. In the background, another person is visible on a phone.

You've been
upgraded to 12A —
thank you for being
a platinum member.

A man with dark hair and glasses, wearing a dark suit over a white shirt, is looking down at his smartphone. He is holding a black coffee cup in his other hand. The background is dark and out of focus.

You've just unlocked
5% cash back on
travel this weekend —
tap to activate.

Mobile Loyalty Moments

The battle for consumer attention is heating up

Loyalty programs are growing exponentially, but true customer loyalty is harder to earn and maintain than ever before.

To win consumer attention, brands must capitalize on every opportunity to **deepen engagement**.

18+

Average number of loyalty program membership

Colloquy Loyalty Census

3.8B

US memberships in loyalty programs

MaCorr Research

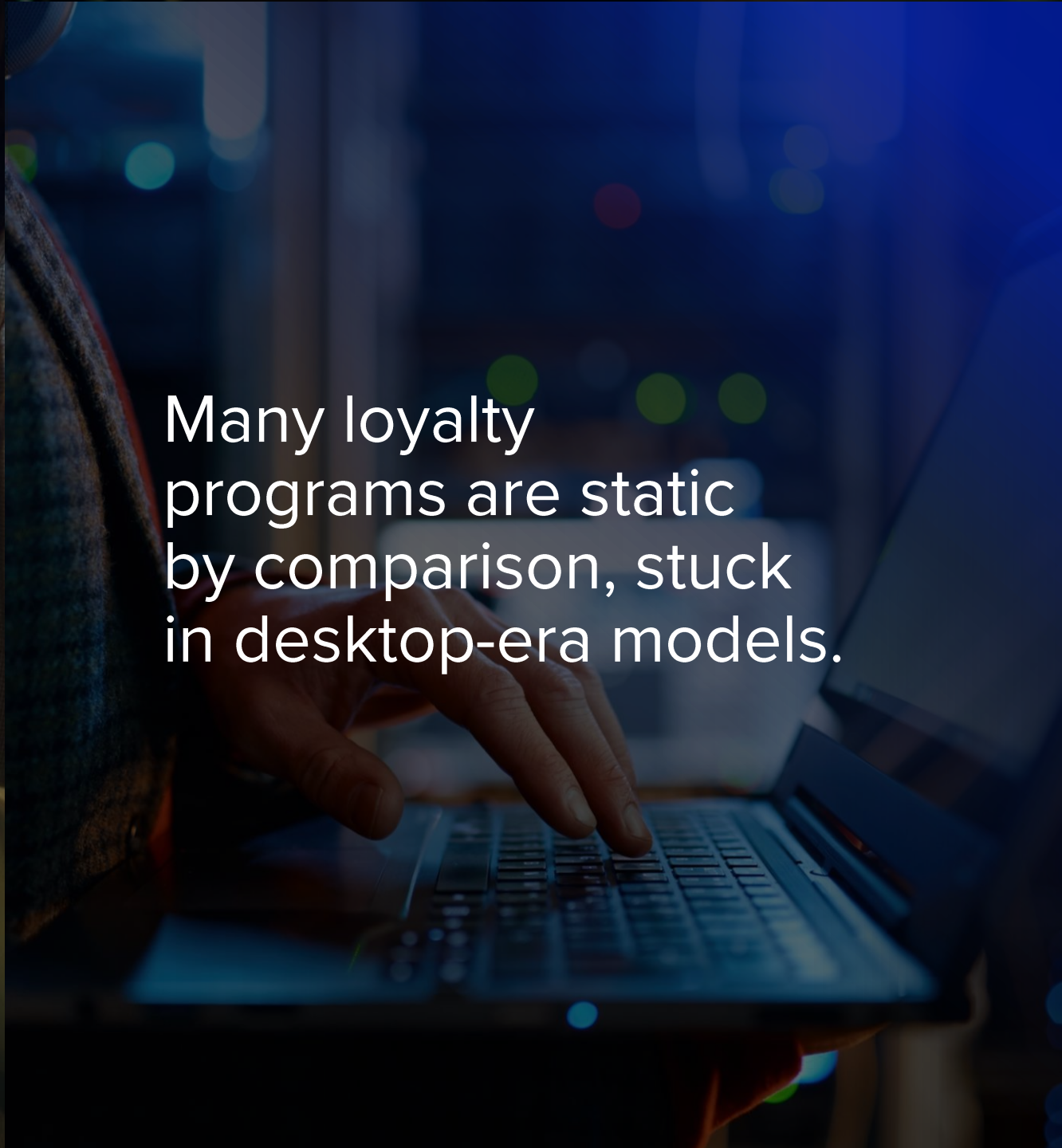
8.4

Average number of active enrollment

Colloquy Loyalty Census

A woman with long brown hair and glasses is looking down at a smartphone in her hands. She is wearing a light-colored jacket over a blue shirt. The background is dark and out of focus.

**Today's consumers
are hyper-connected.
They move fluidly
between physical and
digital touchpoints.**

A close-up of a hand typing on a laptop keyboard. The background is dark with blurred lights, suggesting an office or tech environment.

**Many loyalty
programs are static
by comparison, stuck
in desktop-era models.**

From nice-to-have to non-negotiable: mobile loyalty takes center stage

Mobile is no longer just a channel—it's the foundation of modern loyalty.

COMING SOON!
2025 Loyalty Barometer Report

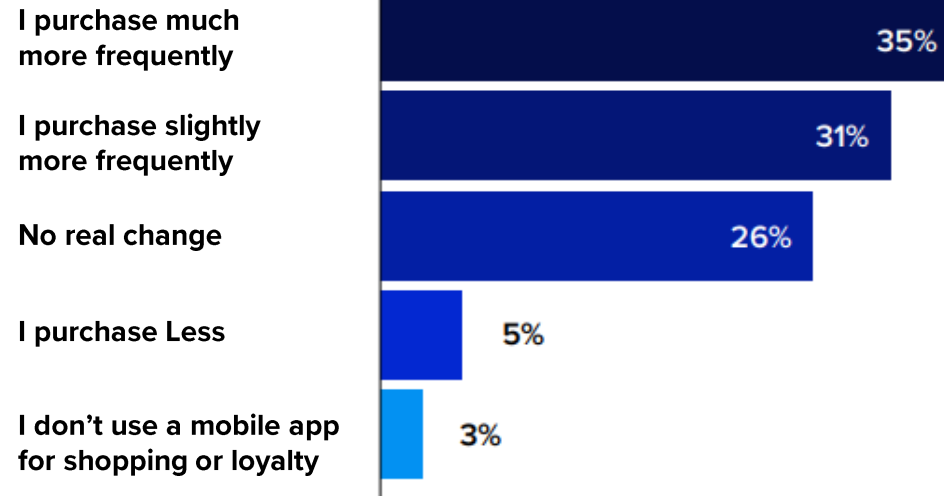


2025 MERKLE LOYALTY BAROMETER REPORT

66%

of respondents say mobile interactions boost
their likelihood of repeat purchases

QUESTION: How has using a mobile app for shopping or loyalty affected your likelihood to make repeat purchases?



Most loyalty programs still treat mobile as a delivery vehicle — not a strategic growth engine

FACTORS LIMITING ADOPTION



Siloed Tech Stacks

Loyalty and mobile, often sit in different orgs — with separate platforms and disconnected data.



IT Bottlenecks

Integrating mobile wallets, apps, and real-time messaging requires cross-functional alignment — often a blocker to speed.



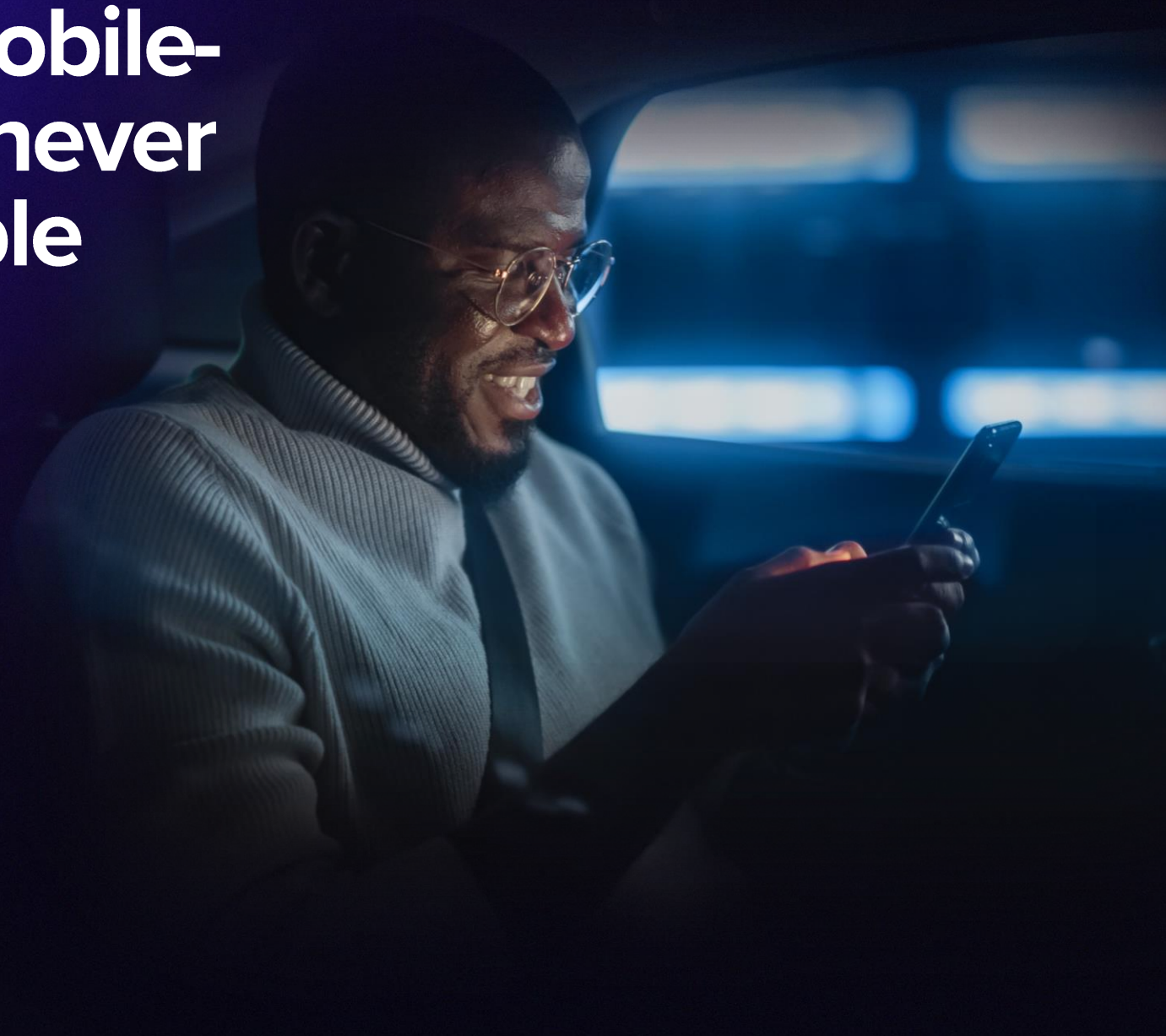
No Clear Playbook

Many loyalty vendors still pitch traditional programs. What's missing is a signal-based framework that takes advantage of native mobile capability.

Truly connected, mobile-first journeys have never been more attainable

Advances in **platform interoperability** have made mobile-first loyalty faster and easier to activate than ever.

Pre-built connectors between systems make it possible to integrate wallet, push, and loyalty functionality with minimal lift.



Turning mobile signals into action

As third-party data disappears, mobile has become the most powerful and efficient way to capture, enrich, and activate the first-party data brands need to compete.

These mobile touchpoints generate rich behavioral signals — from location to app usage — that can now flow seamlessly into personalization engines, media targeting, and lifecycle automation.

Tier Migration

Location Proximity

Mobile Wallet Activity

Time of Interaction

Abandon Cart

App Behavior

Wallet Pass Downloads

App Frequency

Wallet Coupon Redemption

Mobile Loyalty Use Cases



Enabling powerful new loyalty use cases

Seamlessly Connect In-store

Scan a mobile wallet pass at POS to auto-apply rewards and unlock offers. Use POS as a loyalty acquisition point.

Location-Based Engagement

Trigger personalized offers or messages when a customer is near or enters a store location.

Time-Based & Delight Moments

Create urgency with limited-time deals. Push a special "bonus" pass or other exclusive benefit directly into the wallet.

Tier & Status Tracking

Update passes to reflect current tier status, benefits, progress, and available rewards or offers.

Partner & Event Access

Provide branded wallet passes for events and partner offers that accrue loyalty benefits.

Pass Updates for Lifecycle Journeys

Dynamically update pass messaging or visuals based on lifecycle stage (e.g., onboarding, lapsed, high-value).

In-App Experiences

Use app features to drive messaging, experiences, content, games, and incentives tied to loyalty engagement.

Preference Center Data

Use your app preference center to capture useful first-party data to shape loyalty experiences and offers.

LOCATION-BASED ENGAGEMENT

Seamlessly Connect Digital and In-Store

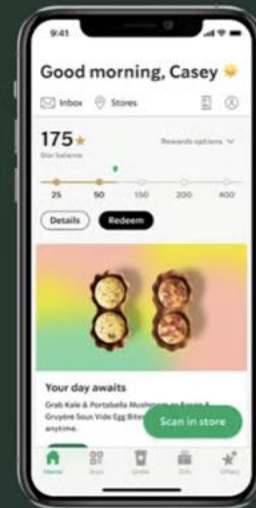
Starbucks' Mobile Order & Pay lets customers customize, order, and pay via the app or in store using mobile wallet.

BENEFITS

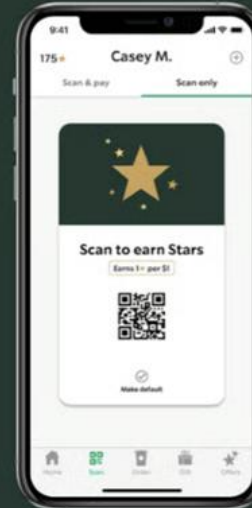
- Seamless rewards integration
- Earn Stars for every purchase made through the app
- Redeem offers effortlessly
- Real-time order updates



COLLECT STARS AND EARN REWARDS



PAY IN STORE



ORDER AHEAD



CUSTOMIZE YOUR ORDER



LOCATION-BASED ENGAGEMENT

Make every shopping trip easy and personalized

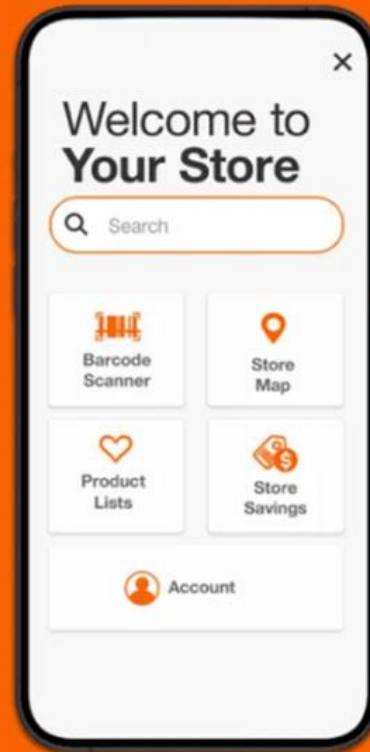
The Home Depot improves the on-site customer experience by encouraging app customers to leverage store mode when in a Home Depot location.

BENEFITS

- Increase foot traffic
- Link loyalty activation to real-world context
- Provide helpful resources and content
- Stay top of mind with relevant calls to action



ACCESS PRODUCT LISTS,
REVIEWS & MORE
WITH STORE MODE



SCAN TO CHECK
PRICES & REVIEWS
WITH BARCODE SCANNER



NAVIGATE YOUR
STORE FAST WITH
PRODUCT LOCATOR



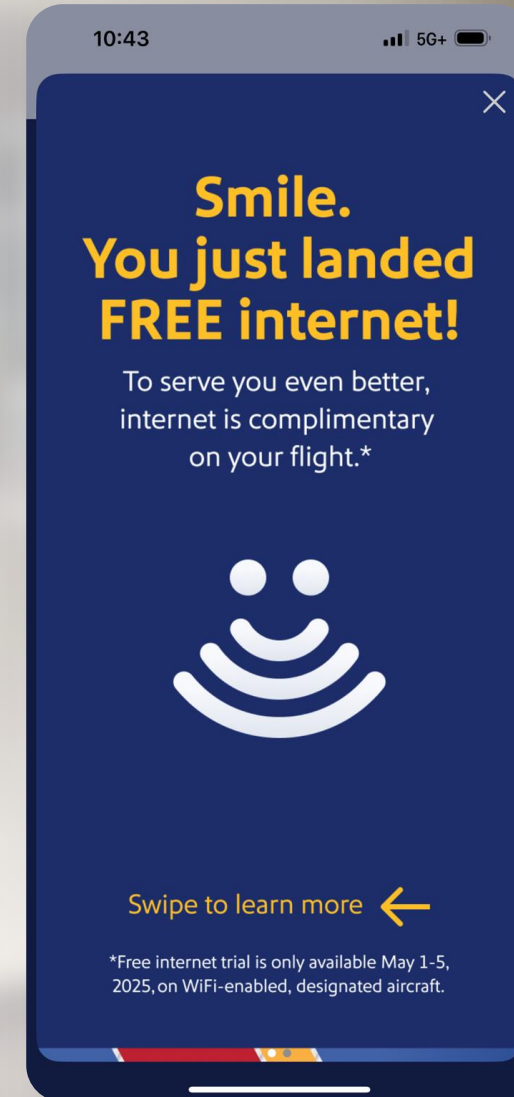
TIME-BASED & DELIGHT MOMENTS

Surprise and delight your best customers at key moments

Southwest Airlines creates brand loyalty by offering app customers free internet during their flights using in-app experiences.

BENEFITS

- Reinforce emotional loyalty
- Delight with an unexpected perk
- Give members a reason to engage



PARTNER & EVENT ACCESS

Provide branded wallet passes for events and partner offers that accrue loyalty benefits

SXSW uses mobile wallet to deliver a mobile guest pass program that lowered costs and extended the digital experience.

BENEFITS

- Create urgency
- Drive engagement without additional messaging
- Personalize based on customer behavior or context

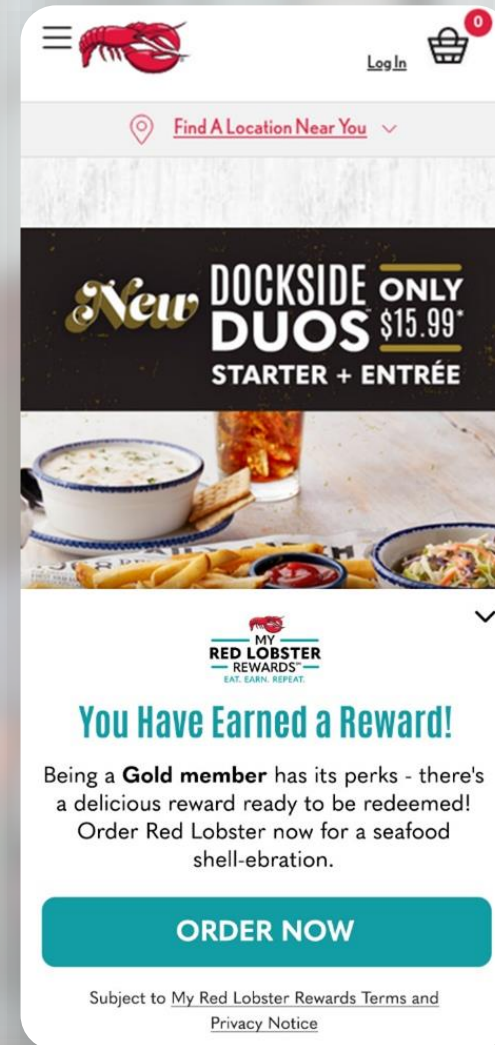


Nudge members to encourage reward usage

Red Lobster updates RLR members when they have earned a reward.

BENEFITS

- Increase reward redemption rates
- Drive repeat visits/purchases
- Reduce point liability as rewards are converted and spent



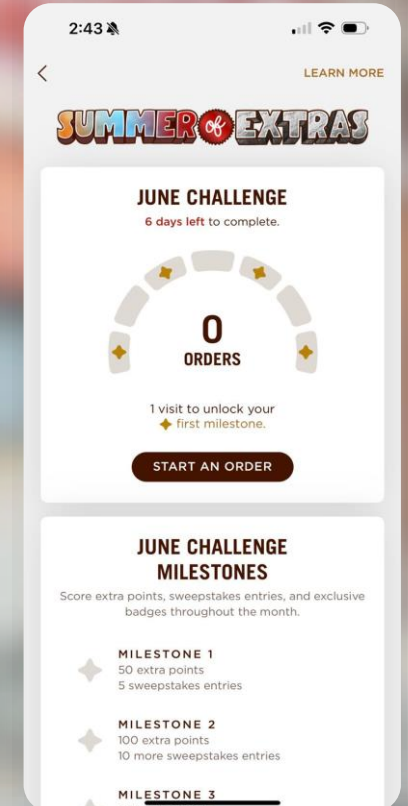
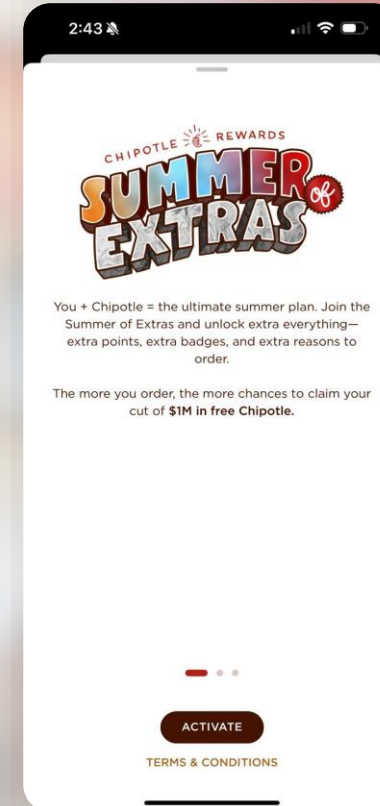
IN-APP EXPERIENCES

Drive loyalty engagement inside the mobile app

Chipotle uses in-app messaging to drive increased awareness and redemption of rewards

BENEFITS

- Boost member acquisition and engagement
- Highlight features that enhance the loyalty experience
- Incorporate gamification and interactive content
- Deliver member-only exclusive content and incentives



Unlocking incremental revenue



Higher Average Order Values

+28%

higher AOV observed among identified users for a national health & beauty retailer.



Increase Purchase Frequency

61%

more frequent purchases observed among identified users vs. anonymous users at a big box retailer.

4X

more sessions and **25% more bookings per month** from loyalty members of one travel brand.



Recapture Abandoned Carts

+126%

add-to-wishlist and **+18.5% add-to-cart** conversion increases driven by segmented campaigns.



Boost Customer Lifetime Value

3.5X

more spend from app users compared to non-app customers.

23%

higher retention rate for app users compared to non-app shoppers.

Enabling Mobile Loyalty

Loyalty needs the right data and tools to build lasting customer relationships



AI & ANALYTICS - Agents, Predictive Recommendations, and Intelligent Dashboards



Automotive



Communication



Consumer Goods



Travel, Transport & Hospitality

INDUSTRY TEMPLATES



Retail



Manufacturing



Financial Services



Health & Life Sciences



CUSTOMER 360





The only cross-channel customer experience platform built for the mobile & intelligence eras

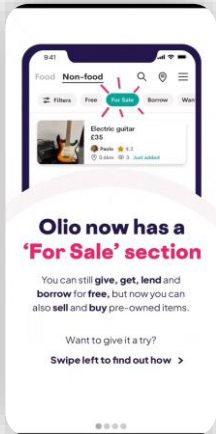
INTERACTIONS



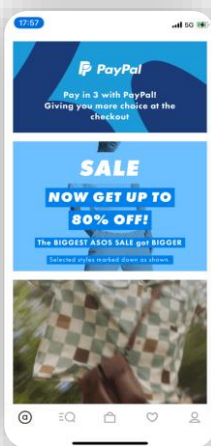
MESSAGES



Onboarding Scenes



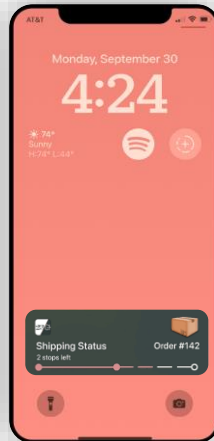
In-Session Messaging



Stories



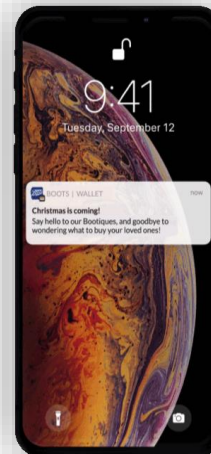
Live Activities



Push Notifications



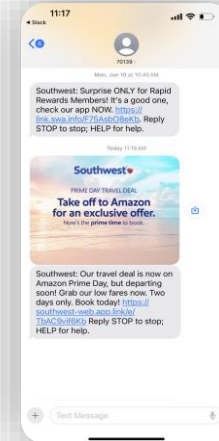
Mobile Wallet



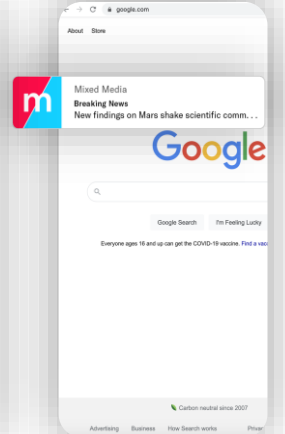
Email



SMS



Web Notifications



ORCHESTRATION | PERSONALIZATION | EXPERIMENTATION | PREDICTIVE AI | ANALYTICS | NO CODE

Together we're enabling mobile-first loyalty at a global scale

Merkle is partnering with **Airship** and **Salesforce** to create a mobile-first loyalty framework that brings the best of each platform together:

Merkle Mobile-first Loyalty

We connect the strategy, data, and orchestration — designing and activating mobile-first journeys that turn loyalty into a living, responsive system.

Strategy

Loyalty program design centered on mobile

Implementation

Pre-configured mobile loyalty accelerators

Managed Services

Strategy, creative, and development support to ensuring long-term success.

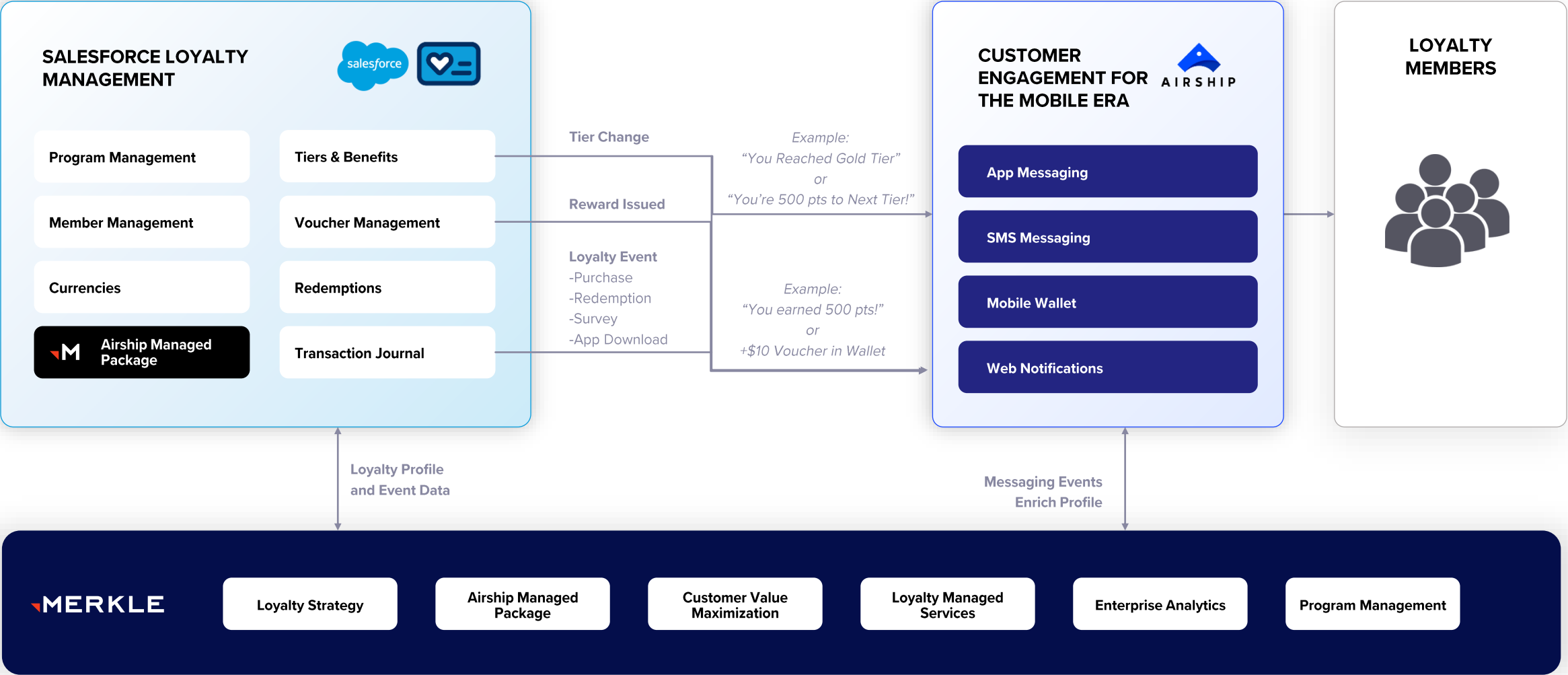


Mobile engagement layer — Airship powers push, in-app, and wallet experiences that move at the speed of customer intent.



Scalable foundation for earning and redeeming loyalty across every touchpoint with Salesforce Loyalty Management.

Real-time integration drives personalized messaging for loyalty members



Features and functionality to acquire, engage, and retain customers

Acquire

Mobile-optimized onboarding



Referral programs



Easy to join via app, wallet, web, or in-store touchpoints



Engage

Personalized campaigns powered by a single dataset



Dynamic offers adapts to real-time context and behavior



Pre-configured mobile loyalty accelerators



- Salesforce-aligned journeys
- Airship wallet integrations
- Signal-based templates

Retain

Mobile Rewards and recognition



Tier and benefit structures



Automated lifecycle journeys



Managed services to evolve and optimize programs



One dataset + one workflow

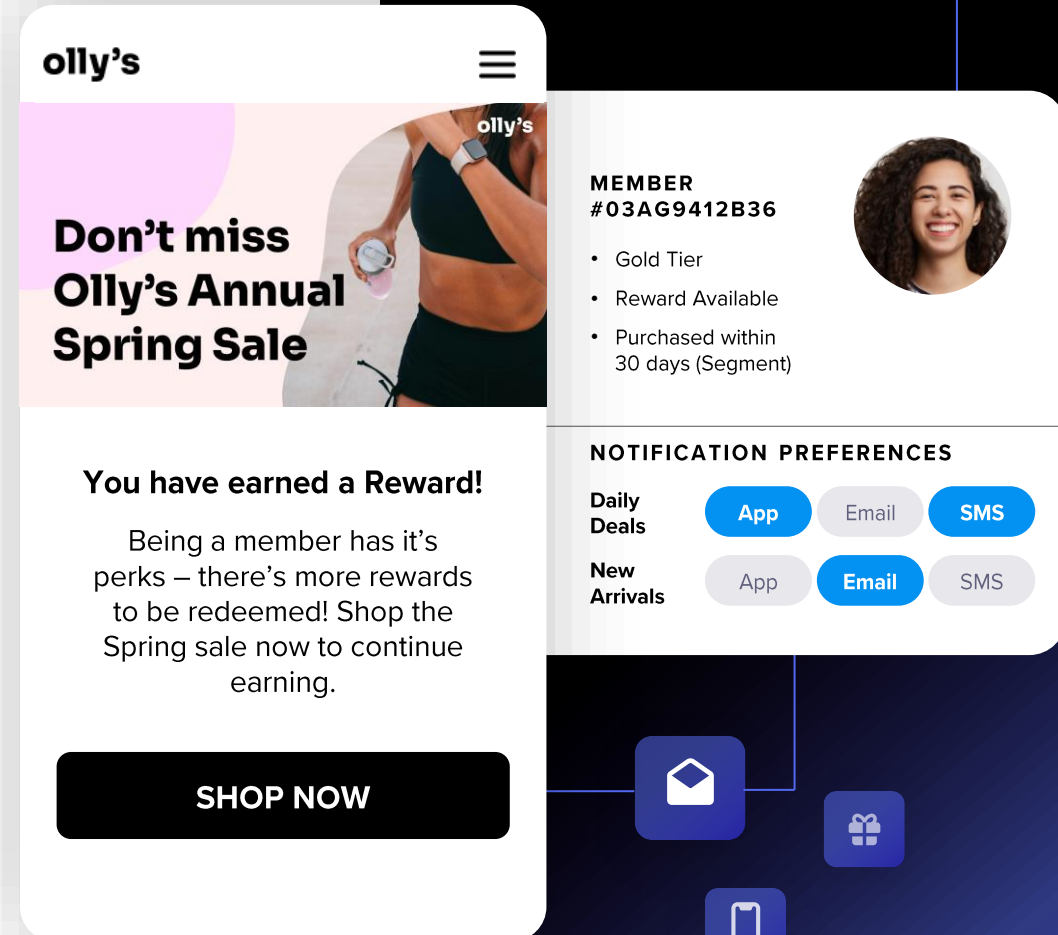
Build once, use everywhere

One Dataset

A unified customer view ensures mobile doesn't operate in isolation—it's strengthened by insights from every interaction.

One Workflow

Journeys and promotions built by admins are instantly mobile-ready, and mobile-first designs can be activated across all other channels for a holistic experience.





Specialization in loyalty with expertise in Salesforce platform



A **Salesforce Partner** for 20 years

#2 Global Agency Partner

6X Partner of the Year award winner

10,000+ Salesforce Certifications

2,000+ *Global implementations*

40+ loyalty and cross-cloud program Blueprints annually

Merkle accelerates Salesforce loyalty outcomes through mobile-first loyalty strategy, expert implementation services, and ongoing managed services.

Power Users

of the Salesforce Loyalty Management Platform

Loyalty Consulting

packaged offerings for Salesforce industries

Weekly Connect

with Salesforce loyalty product owners

Investing

in development of complementary solutions

Early Access

to new SFLM features and capabilities

Pilot Opportunities

our joint customers can shape the future of the platform

KEY OFFERINGS

Loyalty Management Implementation

Program Design Definition and Strategy

Ongoing Technical and Strategic Support

UNIQUE IP

Program Design

Integrated Promotional Games

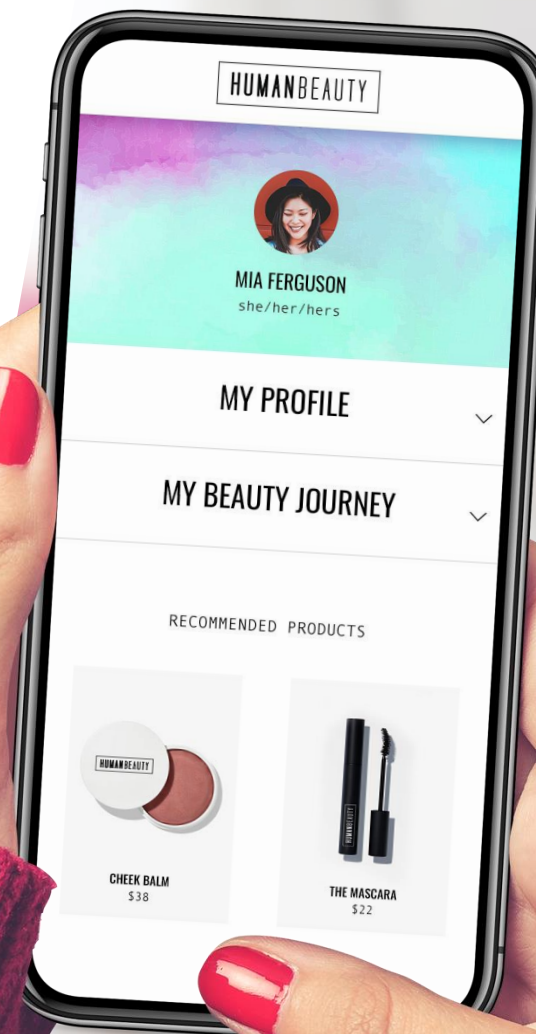
Salesforce-Airship Loyalty Integration

Human Beauty® Mobile Loyalty Journey

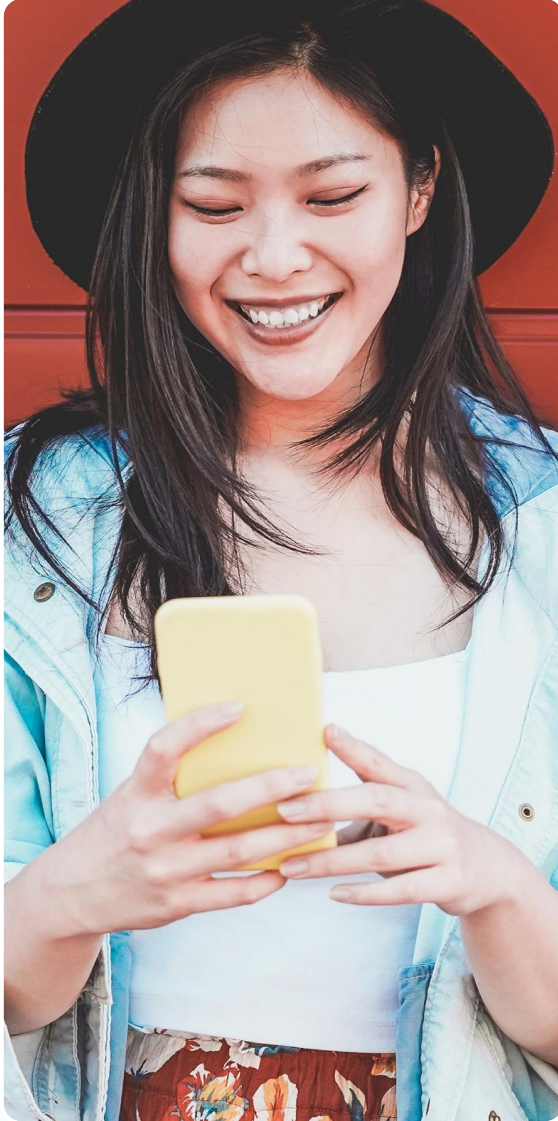
MERKLE

salesforce

HumanBeauty's Mobile Loyalty Journey



Mia



THE CONNECTED SHOPPER

Customer

Age: 23

Lifestyle: Gen Z, active on TikTok/Instagram, values inclusivity + authenticity

Behaviors: Loves skincare trends, shops online and in pop-ups, expects seamless digital experiences

Goals: Earn rewards seamlessly, discover exclusive drops, and have fun engaging with the brand

Pain Points: Gets frustrated with clunky checkouts, irrelevant promos, and boring “points-for-purchase” programs

Jordan



DIRECTOR LOYALTY & CRM AT HUMANBEAUTY

Marketer

Role: Leads the Glow Club loyalty program and CRM strategy

Focus Areas: Driving Gen Z loyalty through mobile-first, shareable experiences

Goals: Capture first-party data, build emotional loyalty, and prove incremental revenue with engaging campaigns

Pain Points: Tech siloes, the need to show ROI quickly, and standing out in a crowded beauty market

Creating loyalty journeys as dynamic as your members

DISCOVER

Reach, Frequency,
Selection

CHOOSE

Engagement +
Acquisition

BUY

Customer
Conversion

ENJOY

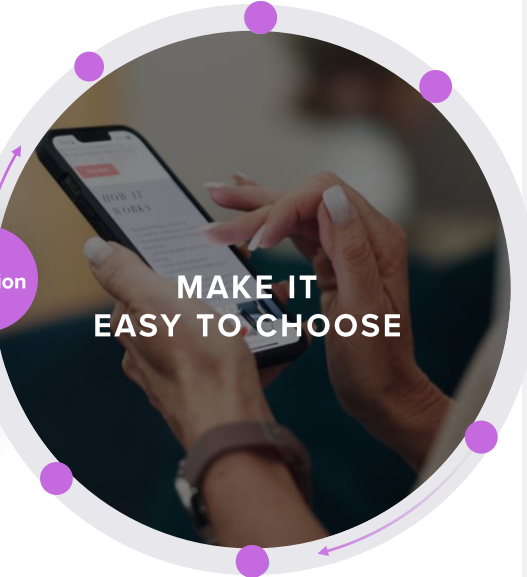
Service, Loyalty

REENGAGE

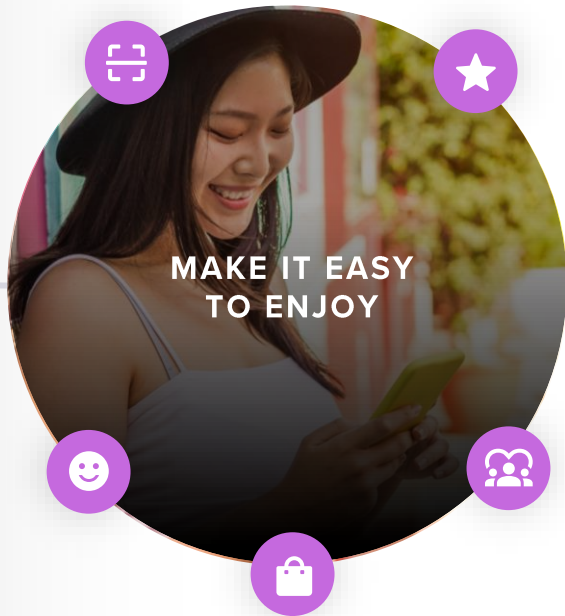
Visit Frequency / Advocacy



Decision



MAKE IT
EASY TO BUY



MAKE IT EASY TO
CHOOSE (AGAIN)

**Mia**

THE CONNECTED SHOPPER

Browsing & Enrollment

Sees a TikTok influencer reviewing HumanBeauty's Glow Serum and joins the Glow Club where she is given a mobile wallet pass to track her brand loyalty status.



MARKETER JOURNEY

Jordan
MARKETER

Creates targeted brand audience and social ad for new to brand customers.

**Mia**

THE CONNECTED SHOPPER



Location-Based Engagement

Walking near a HumanBeauty pop-up, Mia gets a push notification.

**FREE Glow Mask**

Stop by today for a free Glow Mask sample + 2x points.

+2x Pts

MARKETER JOURNEY

Jordan
MARKETER

Uses geofencing to connect digital discovery with in-store trial and acquisition.

**Mia**

THE CONNECTED SHOPPER



Seamless Checkout

Wallet pass auto-applies points at checkout, making the purchase effortless.

Loyalty Member

Member Name
Mia

Member Number
0985752874

Member Tier
Silver (460.0)

Next Tier
Points to Glow Tier: 500

CURRENT TIER

GLOW TIER

**HUMANBEAUTY**

REWARDS POINTS
460.0



0985752874

MARKETER JOURNEY

Jordan
MARKETER

Reduces friction and ensures every purchase is tied to loyalty.

**Mia**

THE CONNECTED SHOPPER



Gamified Progress (Apptivity)

In the app, sees progress toward Glow Tier plus a challenge:

HUMANBEAUTY

CURRENT TIER

GLOW TIER



Complete the Self-Care Sunday Challenge—buy any mask this week for **3x points.**

MARKETER JOURNEY

Jordan
MARKETER

Uses apptivity-based challenges to drive higher basket size and repeat visits.

**Mia**

THE CONNECTED SHOPPER



Surprise-and-Delight

Gets 200 surprise points and early access to a limited-edition product drop.

HUMANBEAUTY

EARLY ACCESS

Glow Without Labels
lip balm

SURPRISE
+200
Pts



MARKETER JOURNEY

Jordan
MARKETER

Reinforces HumanBeauty's inclusive identity with perks that feel exclusive yet community-driven.

**Mia**

THE CONNECTED SHOPPER



Service Recovery

Delivery delay triggers an apology push with 30% off next purchase code added instantly.

**30% OFF next purchase**

Enjoy 30% off your next purchase. Tap to shop!

MARKETER JOURNEY

Jordan
MARKETER

Uses loyalty-linked compensation to turn service hiccups into retention opportunities.



Tier Boosters

Wallet updates with: “Reach Gold this week—3x points on your next serum purchase.”

Loyalty Member

HB HUMANBEAUTY

REWARDS POINTS
460.0

0985752874

Member Name
Mia

Member Number
0985752874

Member Tier
Silver (460.0)

Next Tier
Points to Glow Tier: 500

CURRENT TIER GLOW TIER



Reach Gold this week—**3x points** on your next serum purchase.

MARKETER JOURNEY



Creates urgency and repeat visits through time-bound tier accelerators.

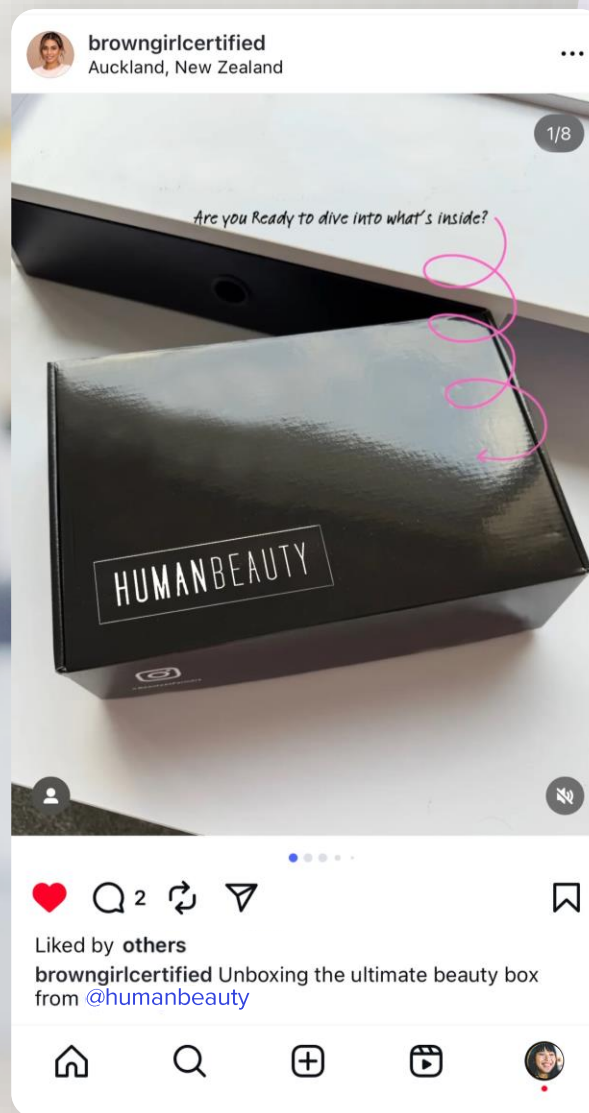
**Mia**

THE CONNECTED SHOPPER



Advocacy + Apptivity

Shares an unboxing video of Glow Club rewards and joins the “Share Your Glow” AR filter challenge on Instagram to earn bonus points.



MARKETER JOURNEY

Jordan
MARKETER

Scales reach and lowers CAC by turning UGC and gamified advocacy into organic growth.

Questions Every Brand Should be Asking

Are we using customer signals to trigger meaningful actions or relying on static campaigns and calendars?

Signals reveal intent, they show us not just who the customer is but what they need in the moment.

Is our mobile app or wallet experience creating value beyond discounts, something emotional, personal, and continuous?

Loyalty grows when customers feel seen, not sold to.

**Can we connect loyalty, CRM, and media data to
power a unified, always-on experience?**

*Because when every channel works together, every interaction
becomes a Mobile Moment.*

Contact Us



James Riess
SVP General Manager,
Loyalty at Merkle
James.Riess@Merkle.com



Vincent Sgro
VP, Alliance Solution Leader
at Merkle
Vincent.sgro@Merkle.com

Mobile-First Integrated Loyalty

Connects strategy, data, and orchestration for responsive loyalty systems

Pre-Configured Integration

Ready-to-deploy journeys integrating Salesforce and Airship wallet capabilities

Real-Time Engagement Layer

Push, in-app, and wallet experiences responding to customer intent

End-to-End Program Support

Strategy, implementation, and managed services for long-term success

SCAN ME



**Download the
2025 Merkle
Loyalty
Barometer
Report Today**

Thank you

 MERKLE

