



# Buyer's Guide

How to Evaluate a Marketing Incentives Platform



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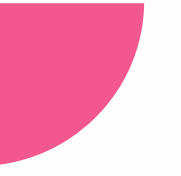
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# Introduction

Maybe you have just decided to start adding digital rewards and incentives to your market research program. Or maybe you already use them but have been managing and distributing them manually. Either way, you're ready to pull the trigger on a rewards management platform. But it's important that you find the one that best fits your needs and goals.

The platform you choose could mean the difference between getting high engagement that produces accurate insights and suffering from poor response rates and, therefore, insufficient and unreliable data. You need a tool that will ensure that you get the responses and engagement you need while automating the process, maximizing your budget, and keeping your program secure.

How can you make sure you're choosing the right one? Here are six things that your incentives management platform should do and the questions you need to ask while evaluating the options.



# 01 Streamline Processes

Any new tool, including a digital rewards management platform, should make your job easier, not more complicated. The point, after all, is to eliminate manual processes to streamline the administration and distribution of incentives and rewards. But that doesn't always happen, depending on the time it takes to set up the tool and the way it fits into your existing workflow.

Ideally, choose a platform that connects seamlessly with the tools you already use for your marketing and customer programs, whether that be Marketo, HubSpot, Talkable, or something else. It keeps you from having to manually transfer a lot of information back and forth between your rewards and marketing platforms. The simpler and quicker the integration can be set up, the better.



Also look at the administrative time it takes to create new reward campaigns, automate reward delivery, and maintain the program. You want to make sure that you get to spend your time focusing on your nurturing leads and customer relationships, rather than on incentives. Think about the unique needs of your campaigns. For instance, are there times when you need to be able to review and approve responses before sending out the reward? In that case, see what features are available in a rewards management platform to help save you time and effort, even when there must be a manual component to the process.

## Relevant questions to ask:

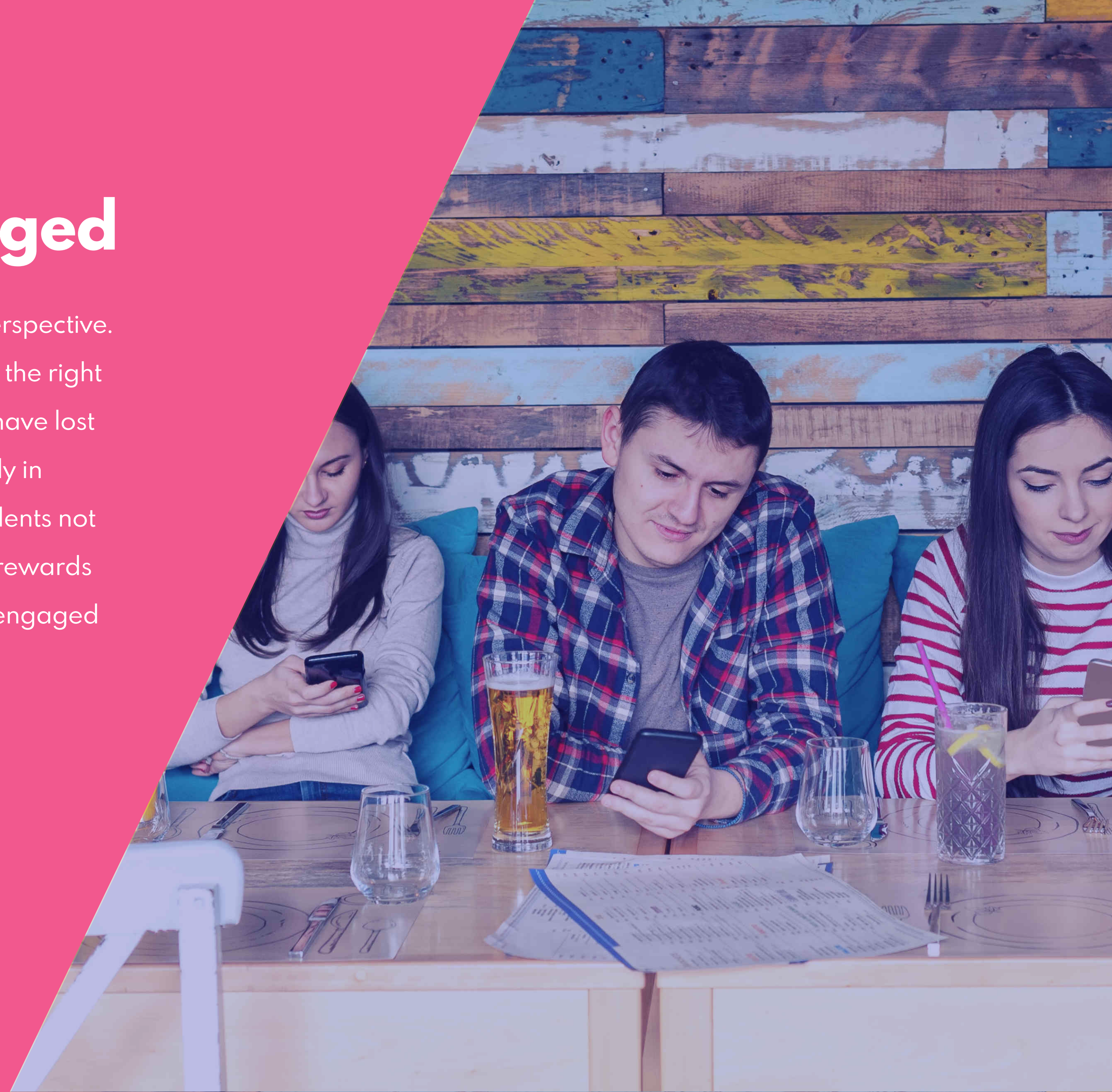
- ? How long does the initial setup take?
- ? Can it integrate with the marketing tools that we already use, and how is that process done?
- ? How much administrative time is required to automate reward delivery?
- ? What other features are there to help us save time?



# 02 Keep Participants Engaged

Next, consider the incentives experience from your recipients' perspective. You focus so heavily on the campaign you're launching, creating the right content and identifying the right market segment, that you may have lost sight of what the respondents think of that experience, specifically in regard to their rewards. But it's a key factor in attracting respondents not only for your current campaign but also any future programs. A rewards experience that is positive and exciting for them will keep them engaged and result in more leads and brand loyalty.

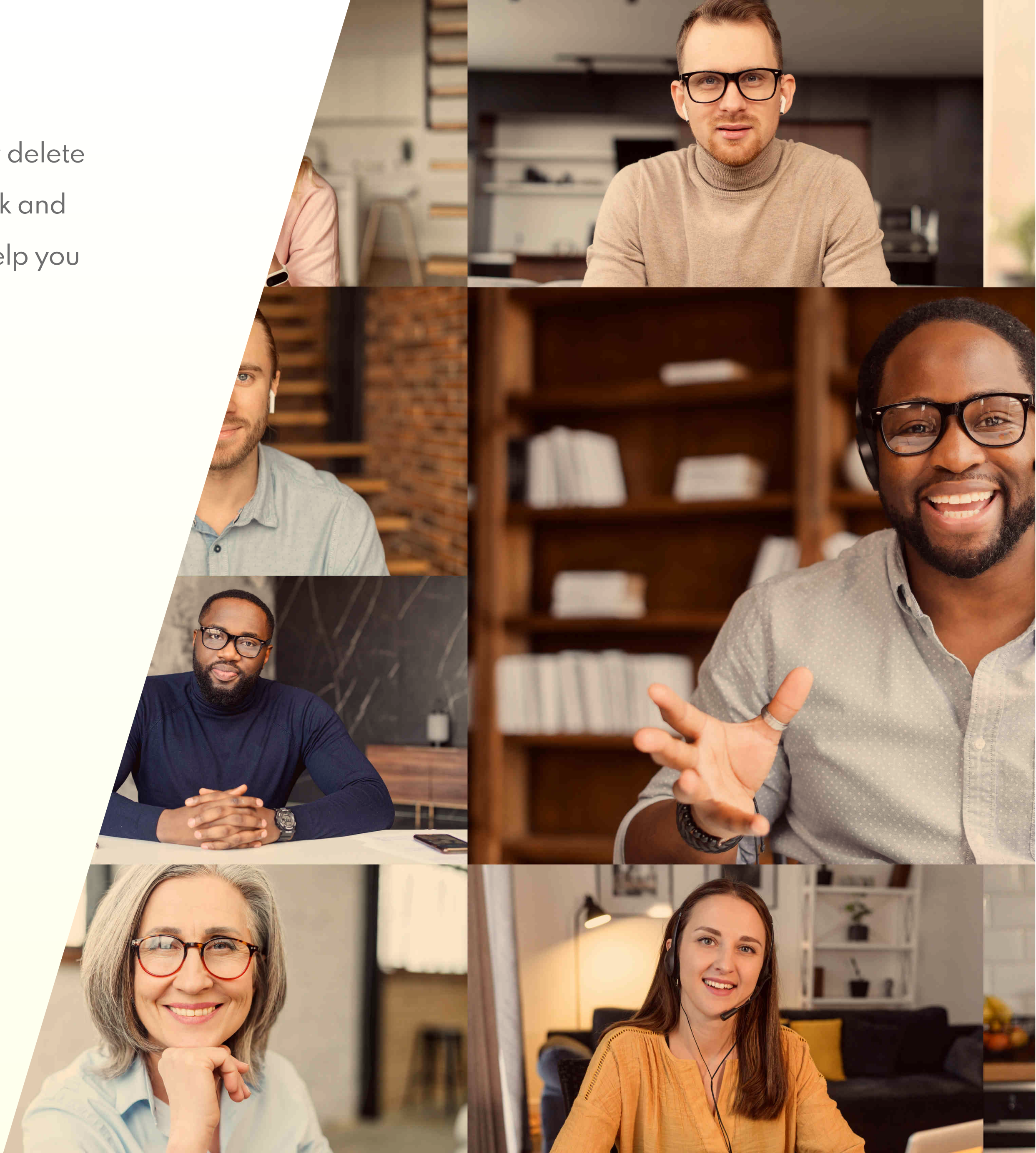
Think about what participants want and expect. They want to feel fairly compensated for their time. They prefer to get their rewards as soon as they have completed the desired task — filling out a survey, attending the webinar, signing up for a demo, visiting a trade show booth, etc. — rather than waiting days or even weeks.



They need to be able to identify the reward email so they don't accidentally delete it or miss it in the spam folder. They want the redemption process to be quick and user-friendly. The right rewards management platform should be able to help you with all of these things.

### Relevant questions to ask:

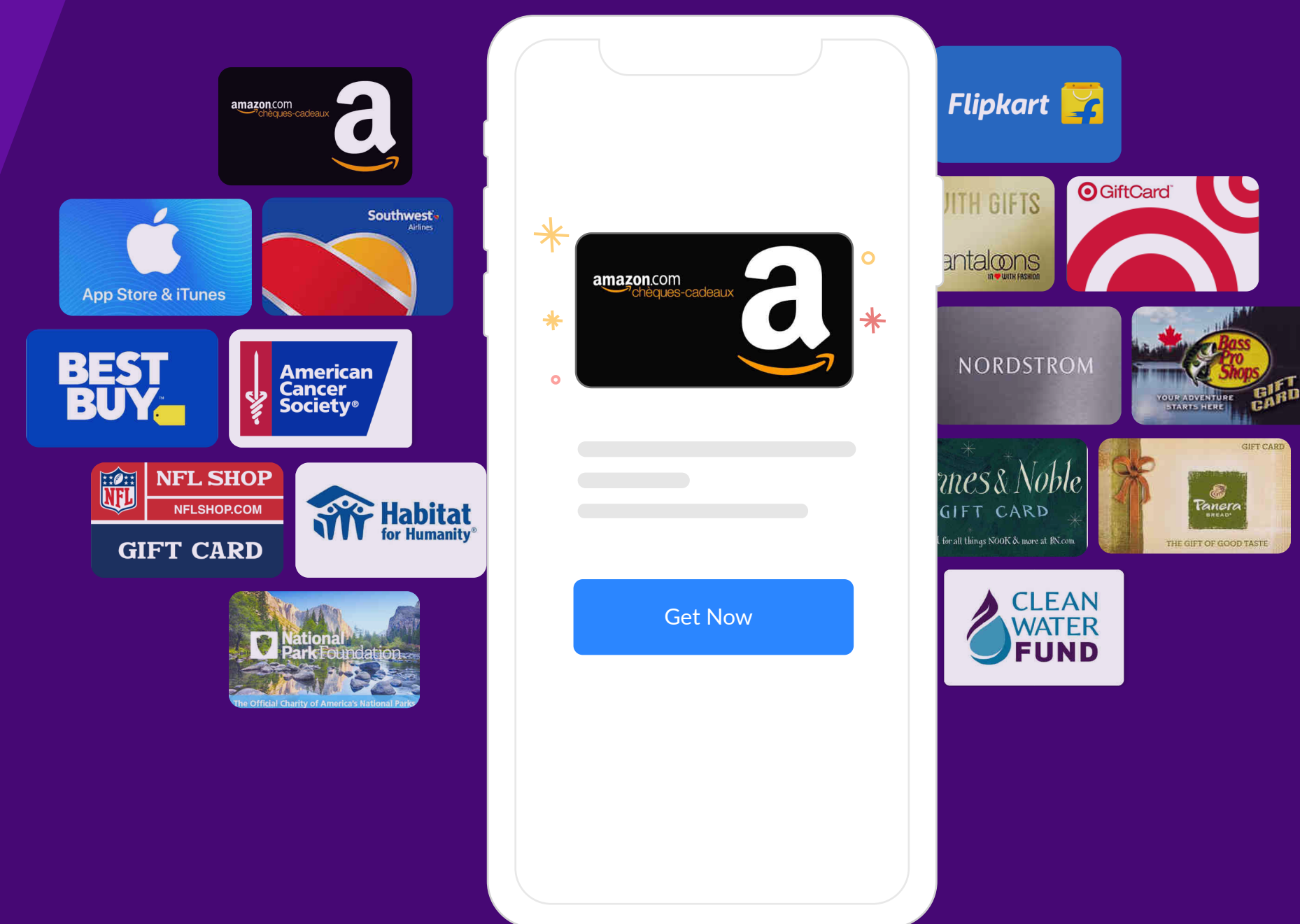
- ? How does the rewards platform enhance the participant experience?
- ? How long does it take for participants to receive their rewards?
- ? What does the redemption process look like?
- ? What is the deliverability rate of the reward emails?
- ? Can participant communications be customized with appropriate branding and messaging?
- ? What can we do to keep participants engaged over time in long-term campaigns?
- ? What happens if a respondent doesn't receive their award or has a problem redeeming it? Does our team have to handle those issues?



# 03 Offer Relevant Rewards for All Participants

Again, you must think about the rewards experience from the recipients' perspective. Participants have different tastes and come from different countries, so look for an incentives platform that helps you delight everyone. You need to consider what type of reward will be most compelling for your target audience — enough to persuade them to complete your survey, submit a referral, or attend a webinar. If you have many programs and clients, you probably need a large selection of rewards to satisfy all those different audiences.

Choose a rewards management platform that offers a wide range of options, including more generic gift cards with wide appeal, like Amazon, Visa, and Mastercard, and more specific interests, for when the program calls for a more tailored approach. Ideally, you should also have the option to let recipients choose which reward they prefer.





Above all, though, you must make sure to offer rewards that the recipients can use. This is particularly important when dealing with international campaigns, with respondents either in a single country or across multiple countries. Digital gift card availability varies from country to country, and many are accepted only in the country where they are purchased. Find a rewards management platform that can streamline this process so that you don't have to manually identify and deliver individual rewards to each country's recipients.

### **Relevant questions to ask:**

- ❓ What reward options are available?
- ❓ What rewards are available for participants in other countries?
- ❓ How can we make sure that participants receive a reward that's accepted in their location?
- ❓ Can participants choose the reward they want?
- ❓ Is there an option to donate rewards to charity?



# 04 Maximize budget

Making the most out of your marketing rewards budget is important to increasing engagement and ensuring that you get the leads you and your clients need. The further that budget can go, the more sales and loyalty you can generate. No matter how well communicated your marketing program is, there will always be rewards that go unclaimed for a number of reasons. Then what? Make sure to choose a rewards partner that has thought this through, find out how it handles that situation, and consider what it means for your budget. The last thing you want is for a large chunk of your money to be wasted on recipients who never redeem their incentive, when those funds could put to much better use on future programs. You want every dollar you send to be effective in getting you the results you need.



## Relevant questions to ask:

- ? Does the platform fit our budget?
- ? What happens if a reward goes unclaimed?
- ? What if I don't use all the rewards I bought?
- ? What are the different pricing plans available?
- ? Are there any other fees associated with the platform?



# 05 Allow for Multi-Project Management and Tracking

Whether you send out just a few campaigns a year or are an agency with a dozen programs running simultaneously, you need a rewards management platform that can keep up. Choose one that has the ability to scale with your company's and clients' needs, which can grow and become more complex over time, especially in today's digital business world.

Most importantly, be sure your rewards platform makes it easy for you to get complete visibility into all your marketing and customer programs. You should be able to track how each rewards campaign performed, how many rewards were sent and claimed, and who received each one. Not only does this allow you to know how your money is being spent, it also helps you optimize your programs so you can increase participation and satisfaction even more in the future.



## Relevant questions to ask:

- ? What tracking and reporting capabilities are there?
- ? How does the platform display multiple campaigns and surveys?
- ? Is it possible to manage projects from many different clients, with different budgets and branding?



# 06 Provide Security for Your Company, Clients, and Recipients

Marketing programs have to deal with all kinds of security and privacy issues. The right rewards platform will minimize your risk by complying with all the appropriate privacy policies, including the European Union's General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). Look for SOC 2-compliant providers, who have gone through an extensive auditing procedure to ensure they manage data securely and protect respondents' privacy.



Also check what the platform does to verify the validity and funding of new accounts. A vigorous process may require more documentation at the start, but it ensures that your rewards program follows all relevant rules and regulations and protects you against potential employee fraud and embezzlement.

### **Relevant questions to ask:**

- ? How does the platform protect against fraud?
- ? What's the verification or due diligence process entail?
- ? Is recipients' data safe?
- ? What security certifications does the platform have?
- ? Does it comply with regulations such as GDPR and CCPA?



# Additional Questions to Ask

- 🔍 Are there case studies, independent reviews, and success metrics (such as consistent participation and adoption) for the platform?
- 🔍 What support will the provider give us, both during onboarding and throughout our program?
- 🔍 How many users/accounts can we have?
- 🔍 Does the platform support single sign-on (SSO)?
- 🔍 What documentation will we need to get started?





BHN Rewards puts the power of rewards to work for marketers through its extensive catalog of digital incentives from top brands like Amazon, DoorDash, Starbucks, Apple, Target, and more. BHN Rewards also streamlines international rewards programs, with options such as Visa and Mastercard prepaid rewards, which work in over 150 countries, and its Smart Global Choice feature, which automatically curates available rewards based on the recipient's country and currency. BHN Rewards integrates with leading marketing and survey platforms, including HubSpot, Marketo, Qualtrics, SurveyMonkey, and Medallia, to make rewarding easy and automatic.

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