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# Avoiding The Icebergs

**A Strategic Assessment for Securing Leadership  
Buy-In for Your Loyalty Program**

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Even the best-laid plans can hit a snag, often due to hidden objections, a lack of support, or priorities that don't quite line up. Think of these as corporate icebergs – they're sneaky and can put a dent in your dynamic loyalty and customer experience (CX) enhancement plans, and it's usually not something you saw coming. If you're gearing up for a loyalty program initiative that needs everyone on board and the budget to back it up, it's smart to look out for these icebergs or even the smaller bumps along the way. **Getting your leadership team to take this assessment is a great first step.** It'll help you spot potential challenges early on, so you can navigate around them and steer your project towards success without any unwelcome surprises.

**The assessment on page 4 is designed to gauge leadership's readiness to back and invest in a loyalty program that leverages gamification and boosts customer engagement.** By evaluating investment buy-in, understanding the impact of CX, willingness to allocate resources, and attitudes towards gamification, you'll get a clear picture of the support level. The insights gained will help you tailor your approach, ensuring leadership is fully aligned with the program's objectives and ready to tackle any icebergs that might lie ahead.

# How to Roll Out the Leadership Readiness Assessment for Loyalty Initiatives



## Step 1

### Distribute the Assessment

- **Document Overview:** This PDF document contains three important pages. **Page 4** is the leadership readiness assessment. **Page 5** provides interpretation guidelines for individual scores, and **Page 6** includes a worksheet for compiling scores and suggests steps for moving up the support levels.
- **Sending Instructions:** Save **Page 4** as a separate document. Then email the PDF to each senior leader with instructions to complete the assessment. **Emphasize** the importance of their honest and individual responses to accurately gauge the team's overall readiness for customer engagement investments.

## Step 2

### Include Logistics and Alay Fears in Your Messaging

- **Deadline:** Set a reasonable deadline for the completion and return of the assessments. Remind participants of this deadline as it approaches to ensure timely submissions.
- **Confidentiality:** Assure participants that their responses will be treated with confidentiality and are crucial for the strategic planning of loyalty program enhancements.

To :  
From :  
Subject : Sample e-mail invite

This assessment is designed to gauge our leadership team's readiness and support for enhancing our loyalty program through gamification and other strategic initiatives. Please complete the survey individually to ensure the accuracy and integrity of your responses. ***It should only take 5 minutes!*** Your input could help us generate years of additional revenue.

Talk about a great ROI!

Once completed, please return your survey to me by **XX/XX**. Your responses will remain confidential and will be used solely for the purpose of this initiative. The goal of this assessment is not only to measure current support but also to identify opportunities for increasing engagement and commitment across our leadership team.

Thanks,  
xxxxxxx





### Step 3

#### Compile Scores

- **Worksheet Use:** Utilize the embedded spreadsheet on **Page 6** of this document to enter scores from each completed assessment. This will provide a holistic view of the leadership team's support and readiness.
- **Analysis:** Analyze the compiled scores to identify patterns, strengths, and areas needing attention within the leadership team's perspectives on the loyalty program.

### Step 4

#### Interpret Individual Scores

- **Guidance on Page 5:** Refer to **Page 5** for detailed instructions on interpreting individual scores. This will help you understand the varying degrees of support among leaders and identify key influencers and potential resisters.
- **Change Management Strategy:** Use the insights gained from the score interpretation to develop targeted change management strategies. Focus on turning skeptics into advocates by addressing their concerns and highlighting the benefits of the loyalty program enhancements.

### Step 5

#### Plan for Improvement

- **Improvement Steps:** Based on the overall and individual scores, **Page 6** outlines steps that can be taken to improve both overall and individual levels of support.
- **Targeted Interventions:** Plan interventions or discussions based on these suggestions to enhance understanding, address concerns, and build stronger support for your loyalty program enhancements.

### Step 6

#### Follow-Up

- **Engagement:** Engage with senior leaders individually or in groups to discuss their assessment responses and any concerns they may have. Use this as an opportunity to further clarify the objectives and benefits of the loyalty program enhancements.
- **Continuous Evaluation:** Consider making this survey an annual or bi-annual process to continuously gauge leadership support and adjust strategies as needed.

**Page 4** is the leadership readiness assessment.

**Page 5** provides interpretation guidelines for individual scores.

**Page 6** includes a worksheet for compiling scores and suggests steps for moving up the support levels.



Please read each statement carefully and select the option that best reflects your stance, ranging from "Completely agree" to "Completely disagree."

**How likely are you to agree with the following statements?**

- 5 - Completely agree
- 4 - Somewhat agree
- 3 - Neither agree nor disagree
- 2 - Somewhat disagree
- 1 - Completely disagree

<b>Category No. 1: Investment and Strategic Importance</b>	<b>Rating</b>
I believe investing in loyalty programs is crucial to our company's success.	
I fully grasp the impact of CX and loyalty programs on customer retention and revenue.	
I am committed to allocating budget and resources to enhance our loyalty program with gamification and other engagement strategies.	
I am convinced that enhancing our loyalty program can set us apart from competitors.	
<b>Total</b>	
<b>Category No. 2: Technological and Operational Readiness</b>	<b>Rating</b>
I view technology as essential in enhancing loyalty programs.	
I believe our company has the necessary technological infrastructure to support gamification.	
Our company is dedicated to integrating customer feedback into the loyalty program design.	
I recognize the significant value of using data analytics to inform loyalty program decisions.	
<b>Total</b>	
<b>Category No. 3: Strategic Commitment and Resource Allocation</b>	<b>Rating</b>
Customer engagement is a key criterion in our strategic planning.	
Aligning the loyalty program with our overall brand values is very important to me.	
I am willing to specifically allocate a budget for gamification in our loyalty program.	
I am prepared to lead and advocate for gamification in our loyalty program	
<b>Total</b>	
<b>Category No. 4: Appetite for Innovation and Collaboration</b>	<b>Rating</b>
I strongly support innovative customer engagement strategies like gamification.	
I am eager to collaborate across departments to ensure the success of the loyalty program.	
I see the long-term benefits of a well-executed loyalty program as fundamental to our success.	
Investing in training for staff to effectively manage and promote the loyalty program is crucial.	
<b>Total</b>	
<b>Grand Total</b>	



## Interpreting Scores for Each Category

Category No. 1: Investment and Strategic Importance		Rating
I believe investing in loyalty programs is crucial to our company's success.		1
I fully grasp the impact of CX and loyalty programs on customer retention and revenue.		5
I am committed to allocating budget and resources to enhance our loyalty program with gamification and other engagement strategies.		5
I am convinced that enhancing our loyalty program can set us apart from competitors.		3
<b>Total</b>		<b>14</b>
Category No. 2: Technological and Operational Readiness		Rating
I view technology as essential in enhancing loyalty programs.		2
I believe our company has the necessary technological infrastructure to support gamification.		5
Our company is dedicated to integrating customer feedback into the loyalty program design.		2
I recognize the significant value of using data analytics to inform loyalty program decisions.		3
<b>Total</b>		<b>12</b>
Category No. 3: Strategic Commitment and Resource Allocation		Rating
Customer engagement is a key criterion in our strategic planning.		2
Aligning the loyalty program with our overall brand values is very important to me.		5
I am willing to specifically allocate a budget for gamification in our loyalty program.		2
I am prepared to lead and advocate for gamification in our loyalty program		3
<b>Total</b>		<b>12</b>
Category No. 4: Appetite for Innovation and Collaboration		Rating
I strongly support innovative customer engagement strategies like gamification.		2
I am eager to collaborate across departments to ensure the success of the loyalty program.		5
I see the long-term benefits of a well-executed loyalty program as fundamental to our success.		3
Investing in training for staff to effectively manage and promote the loyalty program is crucial.		3
<b>Total</b>		<b>13</b>
<b>Grand Total</b>		<b>51</b>

Interpreting scores for each Category	
17 to 20	Excellent
16 to 13	Good
6 to 12	Problem
< 5	Major Concern

Grand Total	Commitment to Support
68 to 85	Strong Support
51 to 67	Moderate Support
34 to 50	Low Support
17 to 33	Minimal Support
Below 17	No Support

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**Total Score Ranges and Recommendations:**

- **68-85 points: *High Level of Support.*** Your strong support positions you for success in driving customer-centric initiatives. Focus on leveraging cross-departmental collaboration to implement and enhance the loyalty program effectively. Continue to champion CX and loyalty program enhancements.
- **51-67 points: *Moderate Support.*** A good foundation of support. Focus on building a deeper understanding of the loyalty program's potential impact through data and customer feedback to move towards higher support. Increase efforts to quantify the impact of CX and loyalty programs. Consider allocating a trial budget for pilot enhancements.
- **34-50 points: *Low Support.*** Increase exposure to successful case studies in gamification and loyalty program benefits. Identify and address specific concerns or barriers. Consider small-scale pilots to demonstrate value.
- **17-33 points: *Minimal Support.*** It's crucial to align with organizational goals and ensure that leadership appreciates the strategic importance of customer loyalty. Educational sessions and discussions with industry experts may help to shift perspectives.
- **Below 17 points: *No Support.*** Critical reassessment of organizational priorities and potential missed opportunities is needed. Consider engaging with external experts for insights.

A minimum score of **51 points** is recommended to achieve true success. This reflects a solid foundation of support necessary for the loyalty program's enhancement and success. Scores below this threshold suggest a need for increased education and alignment on the value and impact of loyalty programs.

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Or use the link to  
download the  
**Consolidated  
Assessment  
Scores Worksheet**

<https://bit.ly/3wJ9SHG>

Rate your agreement with the following statements		Disagreement	Agreement					Rater (each column is one rater)				Combined				
Category	Item		1	2	3	4	5	1	2	3	4	5	Ave	Hi	Lo	STD
Strategy	Purpose	I believe investing in loyalty programs is crucial to our company's success.	2	2	3	2	1	5	4				2.7	5.0	1.0	1.38
	Understanding	I fully grasp the impact of CX and loyalty programs on customer retention and revenue.	2	2	2	3	2	5	4				2.9	5.0	2.0	1.21
	Resources	I am committed to allocating budget and resources to enhance our loyalty program with gamification and other engagement strategies.	2	2	1	2	3	5	4				2.7	5.0	1.0	1.38
	Scope	I am convinced that enhancing our loyalty program can set us apart from competitors.	3	1	2	2	2	5	4				2.7	5.0	1.0	1.38
Readiness	Roles	I view technology as essential in enhancing loyalty programs.	2	2	1	3	1	4	3				2.3	4.0	1.0	1.11
	Resources	I believe our company has the necessary technological infrastructure to support gamification.	3	3	2	2	2	4	3				2.7	4.0	2.0	0.76
	Alignment	Our company is dedicated to integrating customer feedback into the loyalty program design.	4	4	4	4	4	4	3				3.9	4.0	3.0	0.38
	Strategic Needs	I recognize the significant value of using data analytics to inform loyalty program decisions.	4	2	3	2	3	3	3				2.9	4.0	2.0	0.69
Commitment	Plan	Customer engagement is a key criterion in our strategic planning.	3	1	2	1	2	3	4				2.3	4.0	1.0	1.11
	Priority	Aligning the loyalty program with our overall brand values is very important to me.	3	2	1	2	1	2	4				2.1	4.0	1.0	1.07
	Success Factor	I am willing to specifically allocate a budget for gamification in our loyalty program.	5	1	2	1	2	5	4				2.9	5.0	1.0	1.77
	Trust	I am fully prepared to lead and advocate for the implementation of gamification in our loyalty program.	2	2	1	2	1	5	4				2.4	5.0	1.0	1.51
Appetite	Support	I strongly support innovative customer engagement strategies like gamification.	2	2	2	1	2	5	4				2.6	5.0	1.0	1.40
	Collaboration	I am eager to collaborate across departments to ensure the success of the loyalty program.	4	1	3	2	1	5	4				2.9	5.0	1.0	1.57
	Buy-In	I see the long-term benefits of a well-executed loyalty program as fundamental to our success.	3	2	2	1	2	5	2				2.4	5.0	1.0	1.27
	Commitment	Investing in training for staff to effectively manage and promote the loyalty program is crucial.	5	2	5	2	3	5	4				3.7	5.0	2.0	1.38
		<b>Individual Support for Customer Centricity</b>	<b>49</b>	<b>31</b>	<b>36</b>	<b>32</b>	<b>32</b>	<b>70</b>	<b>58</b>	<b>0</b>						
		<b>Overall Support for Customer Centricity</b>	<b>44</b>													