

# **Customer Retention and loyalty program project**



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# 1. Introduction

## Program Name:

- **"Dash Rewards"**

## Objective of the Program:

The primary goal of the "Dash Rewards" loyalty program is to enhance customer retention, increase repeat order frequency, and reduce churn by providing tailored incentives and rewards. This initiative focuses on driving customer engagement through a structured tier-based system that encourages higher spending and frequent use of the platform. By rewarding customers for their continued patronage, the program aims to boost Customer Lifetime Value (CLV) and foster brand loyalty.

Through a combination of personalized offers, targeted campaigns, and effective data segmentation, "Dash Rewards" seeks to create a more rewarding and personalized experience for customers, ultimately leading to higher satisfaction and increased profitability for DoorDash.

## Key Features:

- **Earn Points on Every Order:** Customers earn points for every dollar spent, with bonus points for specific orders like new restaurant sign-ups or large orders.
- **Referral Bonuses:** Encourage customers to invite friends, eventually both earning rewards (e.g., \$5 off).
- **Exclusive Discounts:** High frequency customers get personalized discounts or exclusive access to promotions.
- **Free Delivery Rewards:** Accumulate points to get free delivery or discounted delivery.
- **Tiered Rewards:**
  - **Bronze:** 1-5 orders/month (Basic rewards).
  - **Silver:** 6-15 orders/month (Exclusive discounts, free delivery).

- **Gold:** 16+ orders/month (Priority customer support, higher discounts).
- **Platinum:** 20+ orders/month (Priority customer support, highest discounts).

**Goals:**

- Increase customer repeat order frequency.
- Reduce churn by incentivizing inactive customers.
- Boost Customer Lifetime Value (CLV) by encouraging higher spending through personalized rewards.

## 2. Designing the Campaign Strategy for DoorDash

**Target Audience:**

- Frequent users (1+ order per week).
- Infrequent users, who might be incentivized to order more.
- New users referred by others (to get them started on the platform).

**Personalized Offers:**

- **Personalized Discount Emails:** Targeting customers who have not ordered in the last 30 days with an offer (e.g., "Come back to DoorDash with 20% off your next order!").
- **Seasonal Offers:** Creating holiday-themed campaigns (e.g., "Holiday Dash – Get 30% off on your favorite restaurants!").
- **Local Restaurant Bonuses:** Offering bonus points for ordering from specific local restaurants (to encourage regional engagement).
- **Target Frequent Users:** Offer exclusive rewards to Gold and Platinum-tier members, such as priority delivery or special deals with partner restaurants.

**KPIs to Measure Success:**

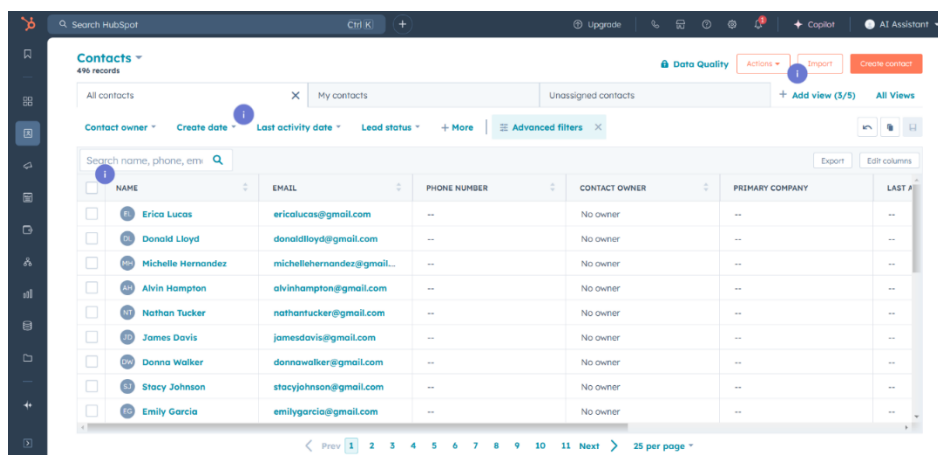
- **Retention Rate:** The percentage of customers who return within a given period after enrolling in the loyalty program.
- **Customer Lifetime Value (CLV):** Measure the value of customers before and after enrollment in the loyalty program.
- **Redemption Rate:** How often rewards and discounts are claimed.
- **Order Frequency:** Compare the frequency of orders before and after participation.

### 3. About the customer dataset

The dataset contains data for 2 months: [doordash\\_loyalty\\_data.csv](#)

Customer ID	First Name	Last Name	Email	Last Order Date	Order Value	Points Earned	Tier	Last Offer Redeemed
1	Anne	Doyle	annedoyle@gmail.com	1/25/2023	\$20.12	20	Gold	Double Points
2	Robert	Beltran	robertbeltran@gmail.com	12/4/2022	\$67.11	67	Bronze	\$5 Off

Uploaded data to HubSpot and created a custom property for contacts to map to fields in the dataset like "Order Value," "Points Earned," "Tier," etc. After that, double - checked for missing values or inconsistencies that may affect workflow automation or segmentation.



The screenshot shows the HubSpot interface for the 'Contacts' list. The table displays the following columns: NAME, EMAIL, PHONE NUMBER, CONTACT OWNER, PRIMARY COMPANY, and LAST A. The data rows include:

NAME	EMAIL	PHONE NUMBER	CONTACT OWNER	PRIMARY COMPANY	LAST A
Erica Lucas	ericalucas@gmail.com	--	No owner	--	--
Donald Lloyd	donaldlloyd@gmail.com	--	No owner	--	--
Michelle Hernandez	michellehernandez@gmail.com	--	No owner	--	--
Alvin Hampton	alvinhampton@gmail.com	--	No owner	--	--
Nathan Tucker	nathantucker@gmail.com	--	No owner	--	--
James Davis	jamesdavis@gmail.com	--	No owner	--	--
Donna Walker	donnawalker@gmail.com	--	No owner	--	--
Stacy Johnson	stacyjohnson@gmail.com	--	No owner	--	--
Emily Garcia	emilygarcia@gmail.com	--	No owner	--	--

## 4. Segmenting Customers

Created Lists on HubSpot based on:

- **Loyalty Tier Segments:** Static lists - "Bronze," "Silver," "Gold" and "Platinum".

The picture below shows the list for Bronze Customers.

Search HubSpot

Ctrl K

Upgrade

Copilot

AI Assistant

Back to lists

**Bronze customers**

Static list

Size: 133 contacts

Last contact added: November 25, 2024 4:57 PM

Filters Performance Activity Settings

Filters

Test contact

Edit filters

Group 1

Tier is any of Bronze

Search in list

Export list

Edit columns

	NAME	ADDED TO LIST DATE	EMAIL	PHONE NUMBER
<input type="checkbox"/>	Dustin Marsh	Today at 4:57 PM	dustinmarsh@gmail.com	--
<input type="checkbox"/>	Bailey Wade	Today at 4:57 PM	baileywade@gmail.com	--
<input type="checkbox"/>	Michele Smith	Today at 4:57 PM	michelesmith@gmail.com	--
<input type="checkbox"/>	Donna Walker	Today at 4:57 PM	donnawalker@gmail.com	--
<input type="checkbox"/>	Kyle Clarke	Today at 4:57 PM	kyleclarke@gmail.com	--
<input type="checkbox"/>	Sarah Williams	Today at 4:57 PM	sarahwilliams@gmail.com	--
<input type="checkbox"/>	Ryan Terry	Today at 4:57 PM	ryanterry@gmail.com	--
<input type="checkbox"/>	Susan Murphy	Today at 4:57 PM	susanmurphy@gmail.com	--
<input type="checkbox"/>	Olivia Green	Today at 4:57 PM	oliviagreen@gmail.com	--

Prev 1 Next 25 per page

- **Order Frequency Segments:** Created active lists for customers based on order frequency - "High Frequency customers" list (order in last 1 month) and "Low Frequency customers list" (orders before one month).

Search HubSpot

Ctrl K

Upgrade

Copilot

Aditi Jain

Back to lists

**High frequency customers**

Active list

Size: 246 contacts

Last contact added: November 25, 2024 6:15 PM

Filters Performance Activity Settings

Filters

Test contact

Edit filters

Group 1

Last Order Date is after 01/01/2023

Search in list

Export list

Edit columns

	NAME	ADDED TO LIST DATE	EMAIL	PHONE NUMBER
<input type="checkbox"/>	Justin Pierce	Nov 25, 2024 6:15 PM	justinpierce@gmail.com	--
<input type="checkbox"/>	Dustin Marsh	Nov 25, 2024 6:15 PM	dustinmarsh@gmail.com	--
<input type="checkbox"/>	Jeffrey Reynolds	Nov 25, 2024 6:15 PM	jeffreyyreynolds@gmail.com	--
<input type="checkbox"/>	Michele Smith	Nov 25, 2024 6:15 PM	michelesmith@gmail.com	--
<input type="checkbox"/>	Hayden Navarro	Nov 25, 2024 6:15 PM	haydennavarro@gmail.com	--
<input type="checkbox"/>	Gregory Wilson	Nov 25, 2024 6:15 PM	gregorywilson@gmail.com	--
<input type="checkbox"/>	David Decker	Nov 25, 2024 6:15 PM	daviddecker@gmail.com	--

## 5. Email automation

Created different email templates for each segment offering personalized rewards based on their loyalty tiers and frequency of orders. (Email screenshots are included with workflow in next section)

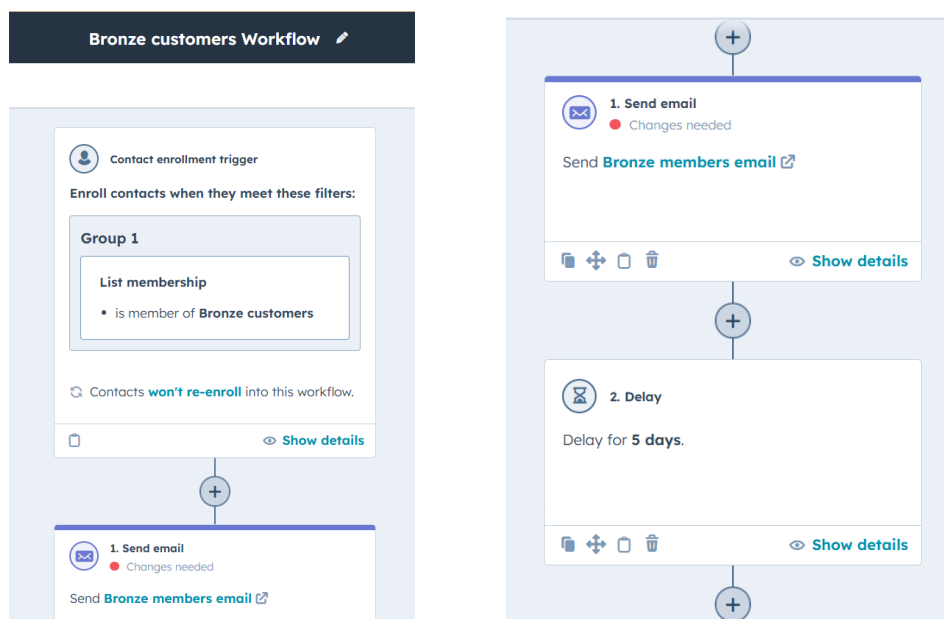
Emails include:

- **Bronze Members:** Offer free delivery.
- **Silver Members:** Offer 20% off.
- **Gold Members:** Offer \$5 off on their next order.
- **Platinum members:** Offer \$10 off on their next order

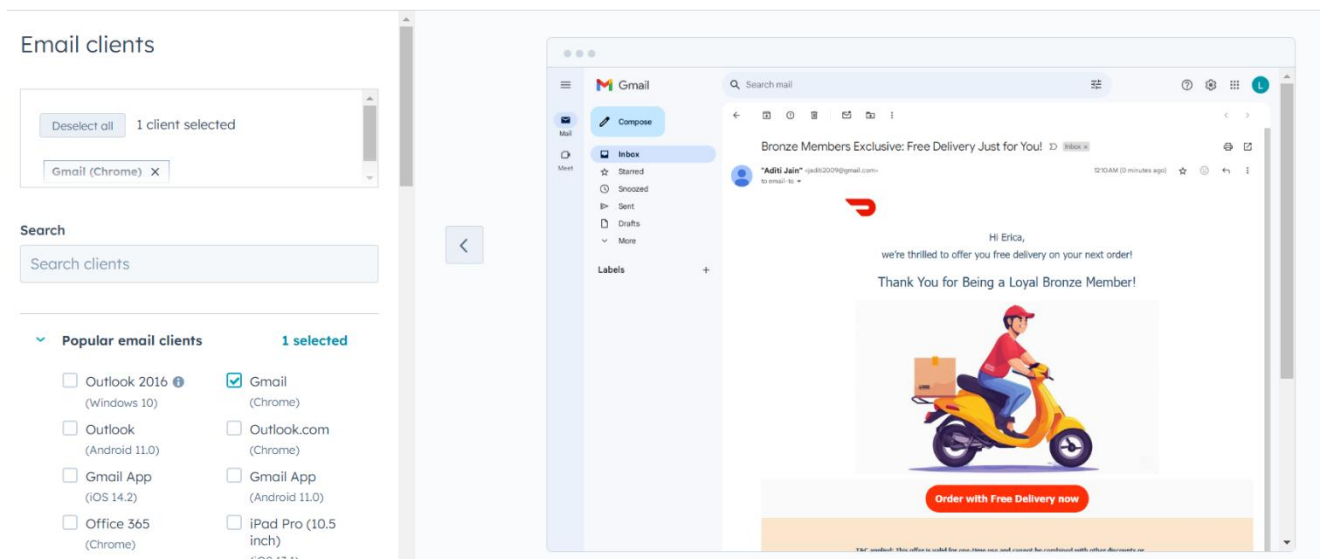
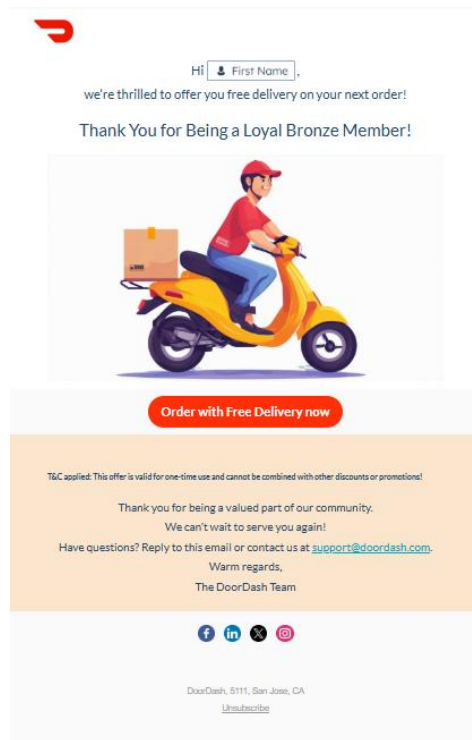
## 6. Workflow Creation

Using Workflow tool, created a new workflow for each segment (e.g., bronze members, silver members, high frequency customers etc.).

Here's an example of **enrollment trigger set up for bronze customers**:



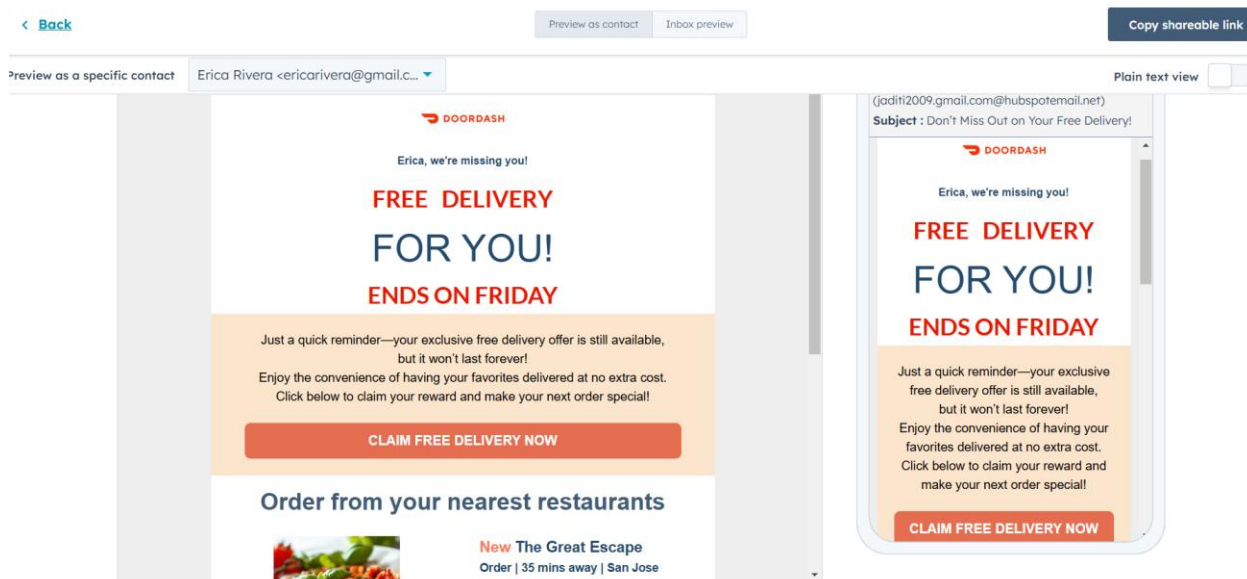
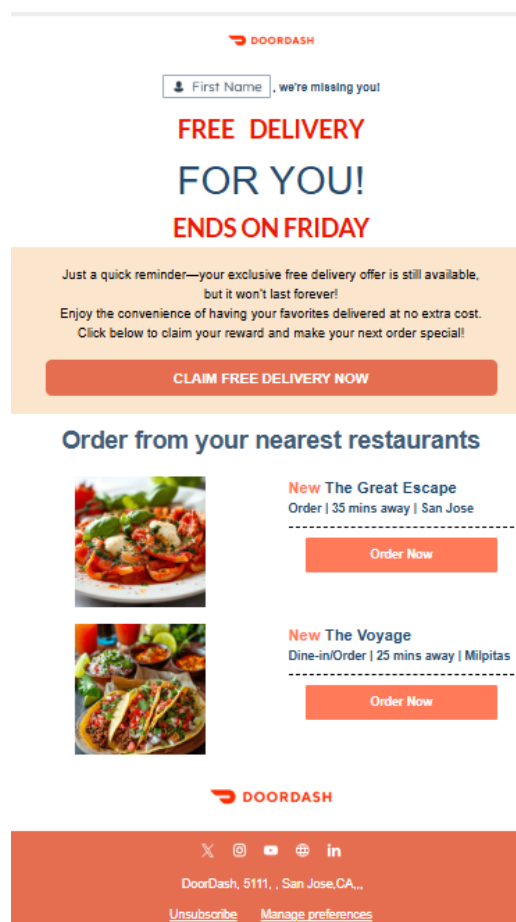
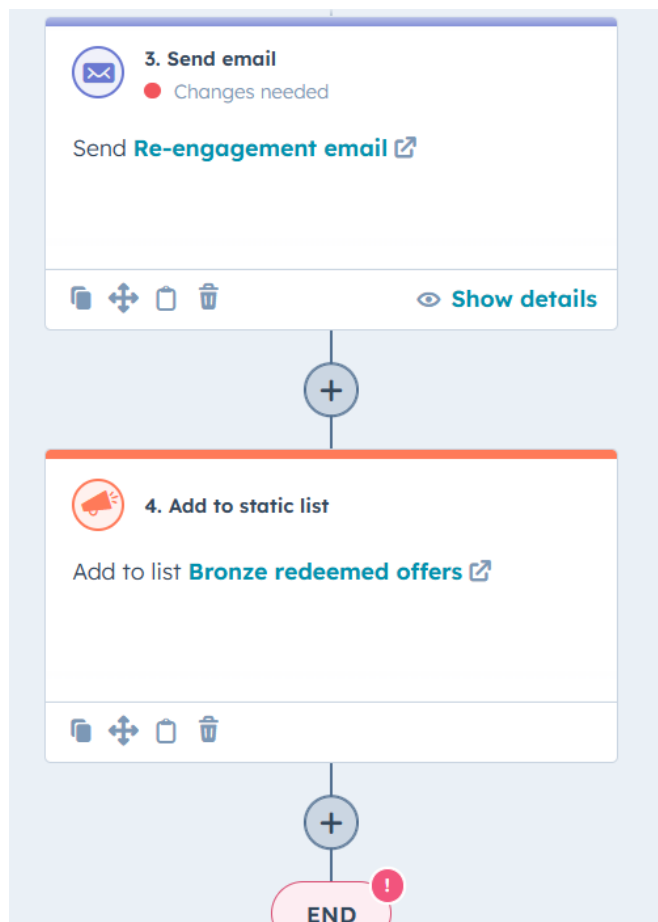
## Bronze members email

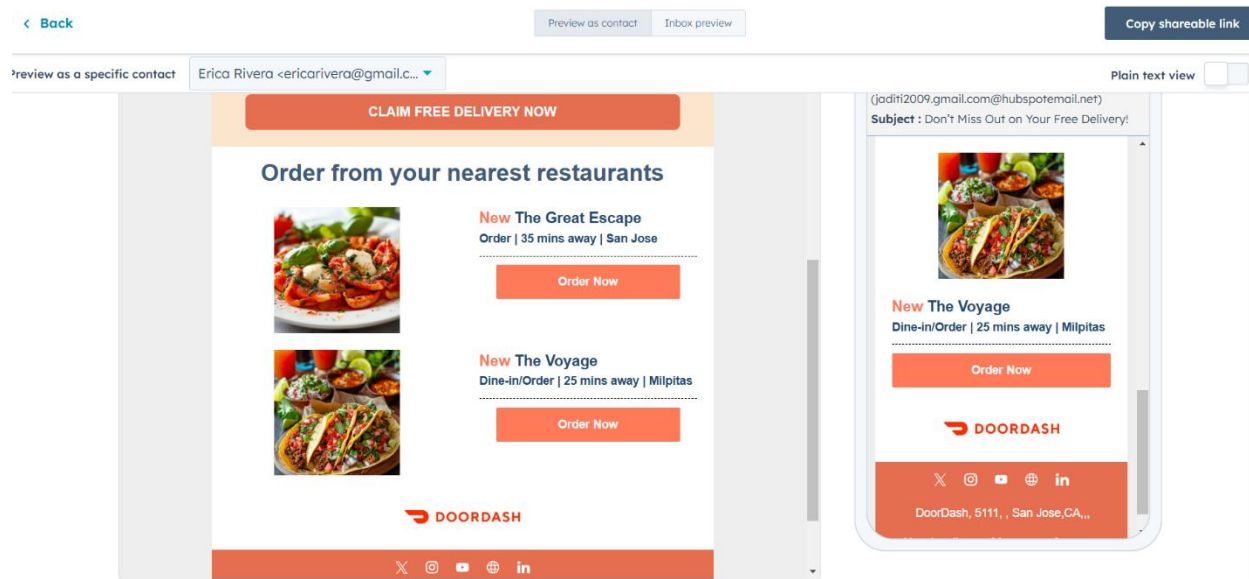


Before the next action/email, a 5-day email delay has been set up and then comes the re-engagement email.



## Re-engagement email



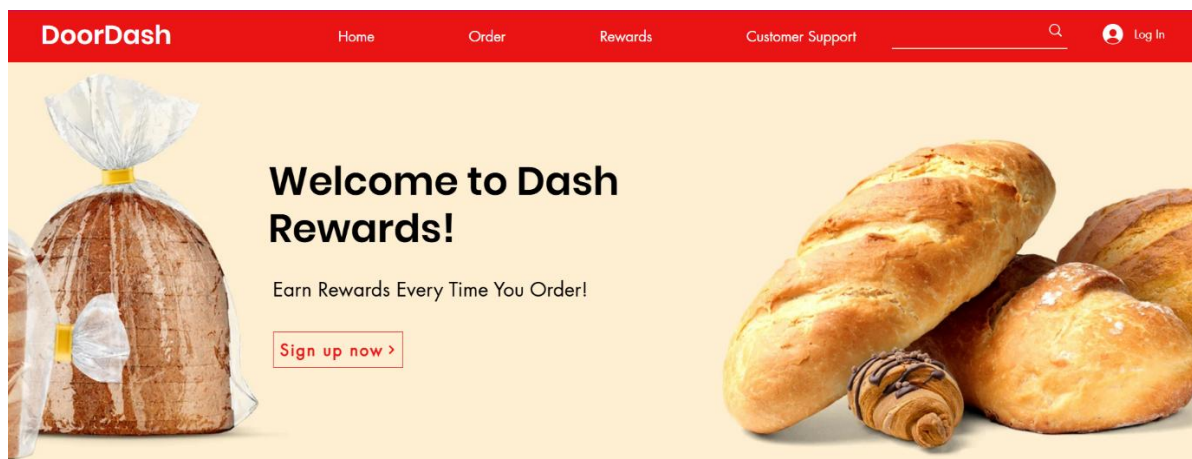


After completing the 3<sup>rd</sup> action of re-engagement email, I had set up the 4<sup>th</sup> action to move the customers to another static list which would consist of people who redeems the offer.

## 7.Wix website and HubSpot integration

Using Wix, developed a visually appealing, responsive website dedicated to the "Dash Rewards" loyalty program. Below is the link-

<https://jaditi2009.wixsite.com/doordash>



**a. Integrate HubSpot “sign up” form into the Wix landing page and set up workflow triggers on HubSpot upon sign ups**

Created a “Sign up form” for rewards on HubSpot -

This styling won't be applied to your form if you add it to a HubSpot CMS page.

To set a default color and font for all your forms, go to [Form settings](#).

**Form styling options:**

- Default:** Standard input field with a red submit button.
- Linear:** Input field with a light blue background and a red submit button.
- Round:** Input field with rounded corners and a red submit button.
- Sharp:** Input field with sharp corners and a red submit button.

**Form fields (Preview):**

- First Name \*
- Last Name \*
- Email \*
- Phone Number \*
- Referral code

How happy are you with the Forms Tool?

☒ Set as raw HTML form

**Input options**

Your theme affects how your form looks when it's embedded on non-HubSpot pages or viewed on a standalone URL.

This styling won't be applied to your form if you add it to a HubSpot CMS page.

To set a default color and font for all your forms, go to [Form settings](#).

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- Round:** Input field with rounded corners and a red submit button.
- Sharp:** Input field with sharp corners and a red submit button.

**Form fields (Preview):**


- First Name \*
- Last Name \*
- Email \*
- Phone Number \*
- Referral code

☐ I agree to receive other communications from DoorDash. By clicking submit below, you consent to allow DoorDash to store and process the personal information submitted

Then, using the Share link code on HubSpot, integrated the form into hubspot with the HTML embedded code.

✕

# Your updated form has been published



Add this form to your website to start getting submissions. If **'Doordash rewards sign up form'** form was added to your website before, any updates will be applied automatically.

Embed code


**Share link**

---

Start sharing your form with contacts. Your form has been securely published and ready to use at the web address below.

[https://share.hsforms.com/1A1\\_1ewfQ-Gv](https://share.hsforms.com/1A1_1ewfQ-Gv)

Copy

**Preview link in new tab** 

☐ Don't show this again.

HTML

⌵

First Name \*

Last Name \*

Edit Code

Email \*

Phone Number \*

Referral code

☐ I agree to receive other communications from DoorDash.

By clicking submit below, you consent to allow DoorDash to store and process the personal information submitted above to provide you the content requested.

protected by reCAPTCHA

Privacy \* Terms

Submit

HTML Settings

?

✕

What do you want to add?

☐ Website address

☒ Code

Add your code here (HTTPS only):

1

2

3

4

5

6

7

8

Update

What's in the embed?

Sign up for Rewards

### Website view of form

→

↻

🔍

jadhi2009.wixsite.com/doordash

🔍

🌐

📄

📧

This site was designed with the **Wix** .com website builder. Create your website today. [Start Now](#)

First Name \*

Last Name \*

Email \*

Phone Number \*

Referral code

☐ I agree to receive other communications from DoorDash.

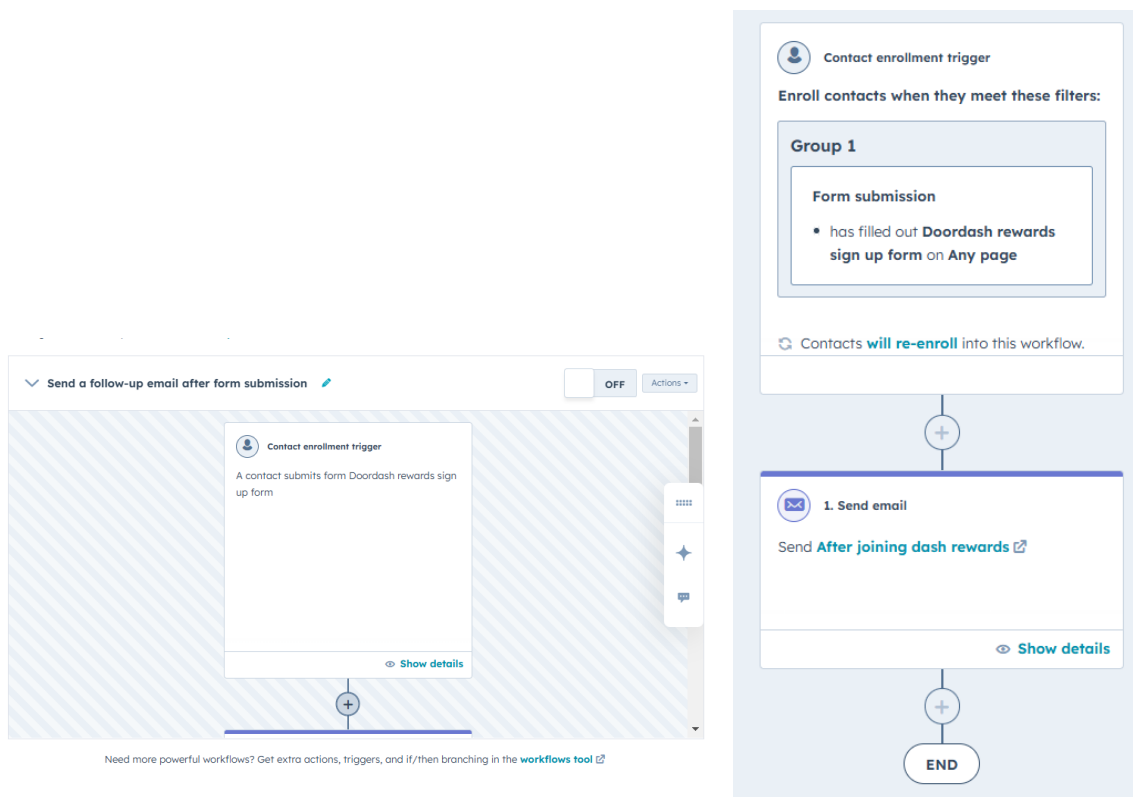
By clicking submit below, you consent to allow DoorDash to store and process the personal information submitted above to provide you the content requested.

protected by reCAPTCHA

Privacy Terms

Submit

After setting this up, created an automated workflow that automatically triggers a welcome email to users who sign up through the form on the Wix website



## Post sign up email

Welcome First Name

Thanks for joining the Dash Rewards family!  
We're so happy to have you on board.


You've earned

**500 points +**

**10% off**

your next order

[Order now](#)



What are you waiting for?

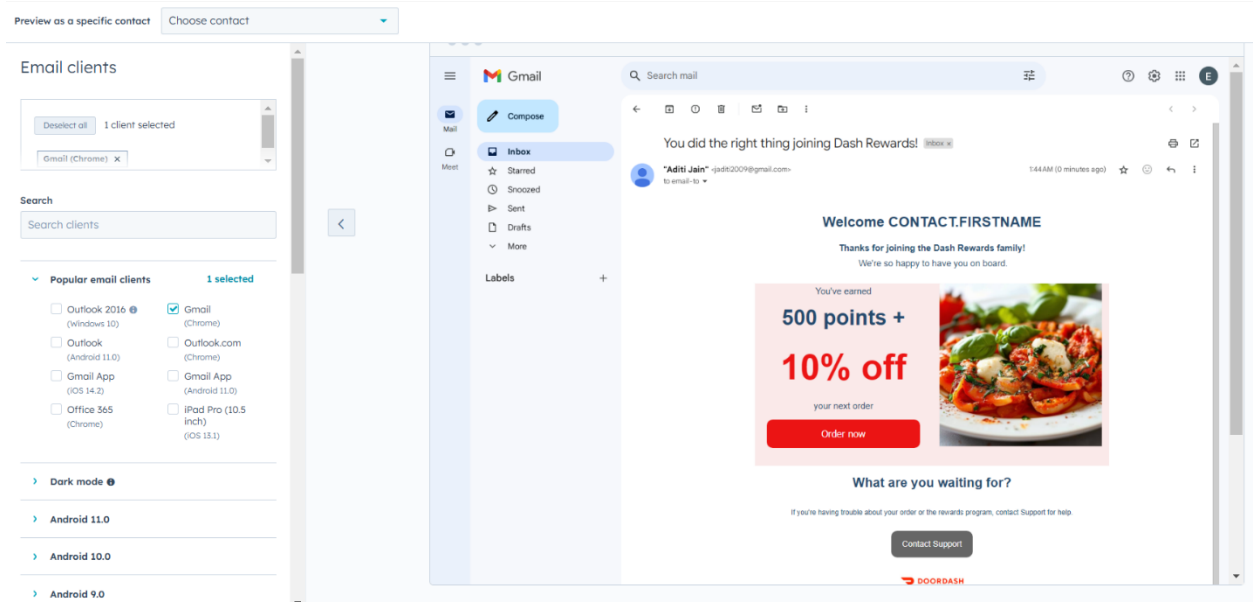
If you're having trouble about your order or the rewards program, contact Support for help.

[Contact Support](#)

**DOORDASH**

[f](#) [in](#) [X](#) [@](#)

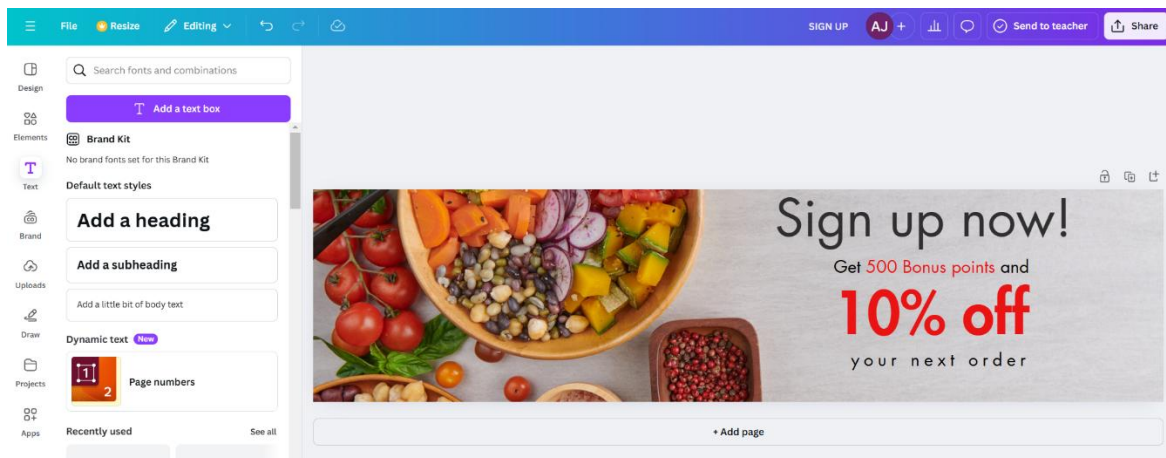
DoorDash, 5111, San Jose, CA  
[Unsubscribe](#) [Manage preferences](#)



## b. Set up pop up “Sign up for Rewards” form on Wix

The pop-up form is created to capture user attention and encourage sign-ups for the "Dash Rewards" loyalty program in a non-intrusive way. It's important because it provides a targeted and engaging opportunity to collect valuable customer data, increasing the chances of conversion by offering immediate information about bonus points and discounts.

Using Canva, made a custom image to be placed at the top of the pop-up form-





## Integrated the Canva image into the pop-up form on HubSpot

Set as raw HTML form

Input options

Your theme affects how your form looks when it's embedded on non-HubSpot pages or viewed on a standalone URL. This styling won't be applied to your form if you add it to a HubSpot CMS page. To set a default color and font for all your forms, go to [Form settings](#).

Label

Submit

Default

Label

Submit

Linear

Label

Submit

Round

Label

Submit

Sharp

Preview

Form

Sign up now!

Get 500 Bonus points and **10% off** your next order

First Name Last Name

Email \*

Submit

Integrated the HubSpot form into a Wix Lightbox using embedded code to trigger the form after specific user actions, making it more likely to be seen by interested visitors.

Page: Sign up to... | matedash.com is available. Connect Your Domain

DoorDash

Lightbox Mode

Lightbox

HTML

Edit Code

What do you want to add?

Website address

Code

Add your code here (HTTPS only):

```

1 <iframe
2   src="https://forms.hsforms.com/forms/30676-8g5e0yplgcode8"
3   width="100%"
4   height="150px"
5   frameborder="0"
6   scrolling="no"
7   style="border: none; overflow: hidden;"
8 />

```

Update

What's in the embed?

Sign up form

Sign up now!

Get 500 Bonus points and **10% off** your next order

First Name Last Name

Email \*

Submit

## Website view of the pop-up form

DoorDash

Home Order Rewards Customer Support

1-5 orders/month

Bronze

Basic rewards + free d

20+ orders/month

Platinum

Highest discounts + exclusive perks

Sign up now!

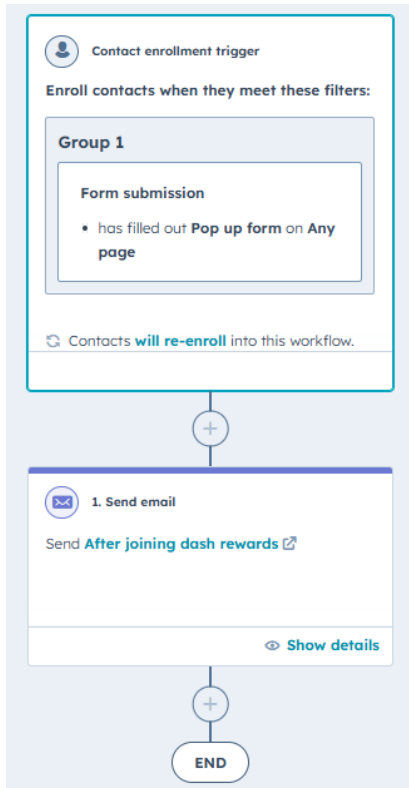
Get 500 Bonus points and **10% off** your next order

First Name Last Name

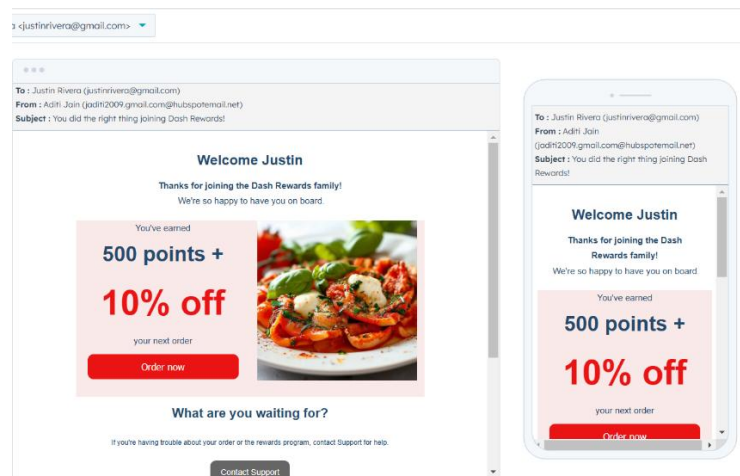
Email \*

Submit

**Created an automated workflow in HubSpot** to send a personalized post-sign-up email immediately after a user submits the form through the pop-up form on Wix, enhancing customer experience and program retention.



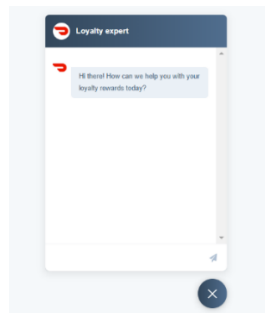
**Workflow**



**Post sign up email**

### c. Set Up Chatbot in HubSpot and integrate into Wix

Customized the live chatbot on HubSpot and using the embedded code, can integrate that into Wix (haven't integrated right now, as I am not using premium Wix subscription)





Back to chatflows

doordash chatflow

Preview

Build

Target

Display

Options

### Build

Create a welcome message to greet site visitors.

- Welcome Message
- Knowledge base search
- Automatically assign conversations
- Email capture

### Display

Customize the chat heading, chat display behavior, and timing controls. Manage the accent color, chat placement and more under [inbox settings](#).

Choose chat avatar

Add a custom image or logo to give your chat a personalized touch.

Chat heading

Custom branding

Name

Loyalty expert

☐ Use custom branding throughout the conversation as an alias for agents

Chat display behavior

Using the embed code below, we can integrate live chat feature into website and track the user interaction and behaviour metrics on HubSpot

Settings

Your Preferences

General

Notifications

Account Management

Account Defaults

Audit Log

Users & Teams

Integrations

Marketplace Downloads

Tracking & Analytics

Tracking Code

Tracking URLs

Set up tracking by embedding code

Copy and paste this tracking code into every page of your site, just before the `</body>` tag.

Embed code

```

<!-- Start of HubSpot Embed Code -->
<script type="text/javascript" id="hs-script-loader" async defer src="//js.hs-scripts.com/47664771.js"></script>
<!-- End of HubSpot Embed Code -->

```

Copy

Email to my web developer

Need help?

Detailed instructions for installing tracking code can be found [here](#).  
Tips for validating your tracking code installation can be found [here](#).

## 8. HubSpot reporting

The last step of the campaign is to go to track the performance and measure its effectiveness.

### a. Use HubSpot Reporting:

Track metrics such as:

- **Open Rate** and **Click Rate** for email campaigns.
- **Redemption Rate** for the offers.
- **Customer Lifetime Value (CLV)** for segments.
- **Conversion Rate** of customers moving between loyalty tiers.

### b. Evaluate Campaign Impact:

- **Retention Rates:** Measure how many customers remain active and continue making purchases.
- **Points Earned:** Analyze if customers are earning and redeeming points, and if that's driving purchases.