

# Financing the Future

A Points-Based Program That Secures ROI and Improved Engagement.



## KEY PROGRAM RESULTS

**85%**

**global enrollment**  
based on potential  
enrollees

**52%**

**global engagement**  
based on enrolled  
participants

For over **5 YEARS**,  
the program has a  
global ROI ranging  
from

**90-300%**  
**ROI**

Percentage of deals made with the client's financial solution based on sales personnel enrollment in the program:

**US**

**Enrolled and engaged:**

**55%**

**Unenrolled:**

**44%**

**25% INCREASE**  
in U.S. deals made with client from enrolled and engaged dealer sales personnel

**GLOBAL**

**Enrolled:**

**54%**

**Unenrolled:**

**45%**

**22% INCREASE**  
in global deals made with client from enrolled dealer sales personnel

## CLIENT

A global, Fortune 100 leader in the manufacturing and financing of construction and mining equipment.

## OBJECTIVE

To support and improve the standing business model with incentives while increasing loyalty, sales, cross-selling, and engagement with the target audiences.

## CHALLENGE

Being a global initiative, both program design and communication tactics had to appeal to multiple cultures, demographics, and motivations while appealing to several different layers of audience members within the client's go-to-market strategy.

## SOLUTION

The client turned to HMI based on our global capabilities, having run programs in over 60 countries.

HMI crafted a global program for the client, which targeted dealer sales personnel, who were rewarded in several different ways.

Firstly, this audience was rewarded for creating a contract with a customer for a machine that was financed directly by the client. The total points awarded for every machine financed varied based by units included and country.

Secondly, the sales personnel were rewarded for cross selling bundles such as insurance, warranties, etc. supplied by the client onto financing deals. The more solutions the sales representatives were able to add onto a deal, the more points they would earn.

Sales personnel also had access to bonus point opportunities they could earn on a deal as well for a variety of ways such as “conquest” or new

business or commercial business. These bonus points had a fixed point total and would vary to encourage different cross selling bundles.

Additionally, the client offered training for dealer sales personnel, which they could take to improve their financing knowledge. These trainings were offered quarterly and varied in point distribution.

Finally, the program included other point-earning engagement tactics. These included a referral bonus for any salesperson to recommend the program to another, strategies pushing digital efficiencies.

Territory managers, responsible for the overall performance of dealerships that sell the client’s financing deals, were an integral aspect of the program. They were enlisted to help improve engagement with dealer sales personnel and make sure enrollment was high. They could also distribute points to dealer sales personnel for special circumstances.

## STRATEGY & IMPLEMENTATION

### Award Opportunities

- Rewards varied by country
- Travel packages
- Event tickets
- Experiential rewards
- Brand-name merchandise

### Marketing & Technology

- Customized by country and audience type
- Teaser, announcement, and program update emails
- Promotional reward opportunity emails to U.S. participants
- Segmented email campaigns highlighting different rewards based on point balance

- Customized monthly eStatements
- Custom eNewsletter
- Announcement videos
- Survey emails to generate participant feedback

### Program Design

- Online reward platform
- Simple and easy claim submission process
- Dedicated incentive program management team
- Custom-designed dealer leaderboards
- Online catalog with order tracking