

GUIDE

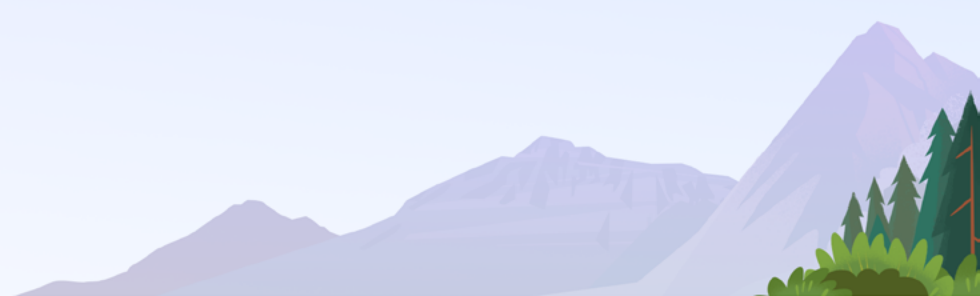
AI Agents Supercharge Retailers' Loyalty Programs

Use trusted real-time data and AI to build relationships with loyal – and profitable – shoppers.



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Introduction

Loyalty programs are [nothing new](#): Ancient Egyptians spent time in temple to earn tokens they could trade for beer. In the 1850s, a baking soda manufacturer rewarded customers for collecting trademark stamps. Even the punch card coupon has been around since 1890. But times have changed: Today's shoppers (usually) want more for their loyalty than free beer, and they don't want to work too hard for those rewards. But [80% of retailers are still figuring out](#) how to ensure the success of their loyalty programs.

[A successful loyalty program](#) creates a personalized, emotional connection between you and your customers, making shoppers feel seen, heard, and appreciated. When customers feel that love, they are more likely to choose your brand even if a competitor offers similar perks or lower prices.

[Emotional loyalty](#) means consumers identify with, trust, and see a brand as part of who they are.

Retailers need to work a little harder these days to win that loyalty, though. According to Salesforce's annual [Connected Customer study](#), 74% of consumers reported switching brands in 2024, a significant jump from 60% who did so in 2023. This is likely the result of economic pressures that caused consumers to make more buying decisions based only on price.

The good news? By adding [AI agents](#) to the mix, it's never been easier for retailers to offer more seamless and personalized experiences, making it simple for customers to engage and feel valued.



Optimize Loyalty Program Engagement with AI Agents

Consumers appreciate brands that provide exclusive, personalized experiences at every touchpoint. Brands like Amazon, Netflix, Target, Starbucks, and Spotify have infused our daily routines with personalized offerings, service, and proactive communication. These types of [personalized experiences](#) – often powered by [real-time customer data and AI](#) – make it easier for shoppers to do business with you, helping boost acquisition, retention, and lifetime value.

These days, that includes deploying [AI agents](#). An AI agent understands and responds to customer inquiries autonomously. They can increase your employee capacity across marketing and loyalty with digital teammates that handle complex tasks with precision, accuracy, and personalization. [Autonomous agents](#) can [assist marketers](#) in creating and revising loyalty promotions with conversational prompts grounded in shopper, point-of-sale (POS), and segmentation data resulting in more personalized email content and subject lines that increase customer engagement.

For example, [Agentforce](#) can generate campaign briefs, target audience segments, create content, and even build customer journeys. And because agents are delivering and optimizing 24/7, they continually analyze performance against KPIs, proactively recommend improvements, and ultimately deliver more personalized loyalty offers and promotions at the most relevant times. This helps your team identify which rewards and offers are most effective, ensuring that resources are spent on tactics that truly engage customers.

Integrate Loyalty Across All Touchpoints

However, even a very curated and personalized loyalty program will fail if a shopper goes into your store and has a less-than-satisfying experience due to inventory availability, checkout delays, or return hassles. To build genuine customer loyalty, AI-powered personalization must extend beyond the digital realm and be [fully integrated with in-store systems](#). While loyalty programs and personalized offers can be highly effective online, if the in-store experience feels disconnected – due to outdated POS systems or lack of real-time data access – customers may perceive the personalization as less authentic. AI can bridge that gap, ensuring that the digital and physical experiences align for a seamless, customer-first approach.

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Many brands are developing [more expansive](#) and individualized loyalty programs and deploying AI agents that offer more ways to engage with the program, earn and redeem rewards, and build long-term trust. Such programs create a sense of belonging and exclusivity that adds value to the shopping experience and differentiates you from your competitors.

Some strategies to consider including in that approach are:

AI-enhanced POS systems with loyalty platforms: Use AI to sync in-store systems with digital profiles, offering personalized rewards and recommendations based on customer history.

AI-powered clienteling tools: Equip associates with AI-driven insights into customer preferences, previous purchases, and tailored suggestions in real time.

AI-optimized product discovery: Use AI to power in-store inventory search and suggest relevant products, both in-store and from online channels.

AI-powered in-store or online retail media: Provide personalized product recommendations, ads, and coupons based on customer data to ensure a seamless and engaging experience.

AI-streamlined returns and exchanges: Leverage AI to simplify returns by recognizing loyalty profiles and streamlining the process, ensuring it's as convenient as online experiences.

AI-assisted customer service: Proactively identify loyal customers and offer them quick and dedicated customer support or chat services.

What Shoppers Want From Loyalty Programs

For loyalty programs to succeed, retailers need to understand their customers' needs and expectations. Today, shoppers seek [genuine connections](#), expect personally tailored offers and services, and will engage in new and different ways to get them.

Consumers' top complaints about loyalty programs are that it takes too long to earn rewards (46%), the rewards aren't worth it (38%), the benefits expire or arrive too late to use (34%), or that offers don't match what they want to buy (30%). And 20% said the programs are too complicated to use. AI agents can help, serving as loyalty "ambassadors" who answer questions for program members, such as showing them the rewards available, clarifying expiration dates, and explaining the variety of ways they can redeem the rewards.

When we asked consumers [what motivates them to use a loyalty program](#), they told us they wanted to earn/redeem points from the retailer (57%) as well as partner retailers (46%), free shipping perks (42%), free or discounted services like tailoring or styling (37%), and birthday perks (31%). Exclusive access to sales (29%) and early access to sales or products (26%) as well as free returns (25%) were also important.



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[The Connected Shoppers Report](#)



We see that loyalty is less about points and spend-based programs and more about human-centered, experiential interactions. Your loyalty program should drive engagement across all touchpoints with some unexpected perks, and AI agents can help you achieve this seamlessly. By integrating Agentforce, brands can automate and personalize these experiences, ensuring that each customer feels valued and understood. In fact, 70% of shoppers we surveyed said they would use a personal agent to optimize their loyalty points.

Make interactions more personal.

People love rewards, but simply offering a loyalty program is not enough. The goal isn't just to get people to sign up, it's to get them to engage more often with your brand.

Many loyalty programs are still transaction-focused and impersonal. According to consumers we surveyed, 57% of retail loyalty programs still offer points-based rewards. Even programs that have evolved beyond points for purchase struggle with [true personalization](#) and engagement, which is a cornerstone of loyalty. By using Agentforce, retailers can more easily create, customize, and scale their loyalty programs, ensuring they remain relevant and engaging for customers. For example, retailers could build a [loyalty management agent](#) to analyze and recommend a program's functions, features, and perks as well as report on usage and feedback to determine what's working and what's not.

Personalized offers and rewards offer perceived value to loyal shoppers. Use what you already know about customers – their purchase history, where and when they buy, their birthday, their lifestyle – to send relevant, unique offers and communications when they mean the most.



of retailers have difficulty delivering personalized experiences in their loyalty programs. AI can help automate these processes.

[The Connected Shoppers Report](#)



Still, 32% of retailers told us they have [difficulty delivering personalized experiences](#) in their loyalty programs. AI can help automate these processes, making it easier for retailers to track and apply rewards in real time. Agentforce, for example, can enhance these experiences by acting as a digital concierge, offering personalized recommendations and 24/7 support, which can significantly improve customer satisfaction and loyalty.

Think beyond rewarding only for purchases.

Today's loyal shoppers want brands to acknowledge and [reward actions](#) beyond a purchase. You can still recognize them for spending with you, but sweeten the pot with rewards for more nuanced levels of engagement.

A Salesforce 2023 survey of consumers showed they are willing to do things like download an app (64%), check into a store (47%), or write an online review (44%) to earn rewards. And 24% of shoppers said they would share the brand on [social media](#) in exchange for rewards. Consumers who give shoutouts to brands on their personal social media accounts are identifying with and vouching for the brand publicly, helping spread positive word-of-mouth sentiment.

Make the rewards worth the data exchange.

We know people crave more curated experiences, and the majority of shoppers are willing to share personal information like a birthday (70%), phone number (52%), or clothing size (52%) for access to more exclusive benefits. This is a huge opportunity – a brand's ability to garner zero-party data directly from its consumers can't be overstated.

First, ask yourself if *you* would trade your data for your program's perks.

First, ask yourself if you would trade your data for your program's perks. Then be sure the [benefits of your program](#) are immediately clear to the customer and your store associates can quickly explain the highlights when they sign up shoppers. Finally, don't ask consumers to share every detail up front. Ask for the bare minimum of information – just a name and email address, for example – to sign up a new member, then use ongoing engagement to gather more data over time. Salesforce's [Data Cloud](#) can help you unify and harmonize this data as it's collected across various touchpoints in the shopper journey, from [in-store POS](#) to ecommerce to social interactions, creating a comprehensive and trusted customer view.

Don't make them work for it.

People don't want to read fine print or chase down rewards. If it takes too long to sign up or they need to do math to redeem benefits, they're likely to walk away. While your program should feel exclusive, make engagement fast and inclusive by using AI to track shoppers across touchpoints. Tracking interactions in real time lets you make rewards available immediately at online checkout or alert in-store associates at the register. You can also trigger outreach to inactive program members with an exclusive offer to renew their interest.

Maintaining the program over time becomes easier because you can automate tasks and processes like data collection, reporting, and communication. That means less work for your employees and your program members. Plus, with [your customer data and Agentforce](#), your program will never get stale. AI agents can suggest ideas for gamification, seasonal treats, one-time offers, or exclusive holiday promotions that build on the success of past promotions and rewards and then take action to activate those programs.



Best Practices for Successful Loyalty Programs

While it can be exciting to brainstorm new perks for your AI-powered loyalty program, there are a few best practices to think through first.

Build your data strategy.

More consistent, personalized journeys create happier, more loyal customers. People have come to expect tailored, [personally relevant experiences](#), customized offers, and enhanced service capabilities. But you can't create truly great experiences unless your [data is in good shape](#). That's why the first step in launching an AI-powered loyalty experience should be building an [effective data strategy](#).

How? By [connecting all customer data](#) across an organization. Unifying your data creates a [complete profile of each customer](#) and offers everyone in the company visibility into how they engage with the brand. Loyalty programs round out these profiles by collecting critical zero- and first-party data through ongoing customer engagement. The insights gained help you further personalize every interaction, better customize offers, and create more relevant customer journeys.

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Building customer profiles and making that data available across your company in real time means every employee can act on in-the-moment customer behavior. This allows for a much richer, more intimate shopping experience.

These tools also streamline behind-the-scenes activities. For example, systems like email-send engines, demand-side platforms, and content management systems can use real-time data and AI to refine customer segmentation, execute better targeting, and support suppression efforts. This makes your loyalty program more efficient and cost-effective.

Boost loyalty with trust and transparency.

[Loyalty hinges on trust](#). Companies must be vigilant in [keeping data secure](#) and be straightforward about how they intend to use it. When [using AI](#) to personalize your loyalty program, be sure your customer data remains within your organization. It should be maintained and secured in your systems and not flowing into an open AI system used by the general public. This lets you embed trust in the very core of your AI.

There's [a lot to think through](#) when deploying AI, but these considerations are essential for security and success:

For better output, be sure your AI understands the context around your questions. Include the type, quality, and scope of the data you want it to analyze in your prompt question.

Protect customer data by automatically detecting and removing personal identification information and payment data from the prompt.

Be sure the AI's [large language model](#) forgets both the prompt and the output when you're done.

Continuously monitor your AI to identify and remove offensive, disrespectful, abusive, or hateful language that could cause it to generate toxic responses and recommendations.

Shoppers are not only [more likely to give their data](#) to companies they trust, they are more likely to remain loyal, make additional purchases, and recommend that company to friends and family. A strong, transparent data (and AI) strategy turns loyalty into a key principle running throughout the organization.

Test and tweak for faster ROI.

In the past, customized loyalty programs required heavy investment and took years to deploy, often resulting in outdated functionality by the time they hit the market. Today you need to act in the moment, pivot quickly, and continue to evolve. You want to [see immediate ROI](#) so you can adjust the program as customer preferences and economic conditions change shopping behaviors and consumer expectations.

You can use AI to measure the efficiency and impact of new tactics, then tweak or overhaul as necessary. You can see, early on, what's working so you can:

Identify the program's most popular features and expand their scope and reach.

Retire benefits that customers don't use.

Discover what is most important to new members, so you can balance engagement with existing and emerging customers.

Determine the perfect combination of benefits to make customers happy and drive profitability.

What's more, AI agents make it easier to gather and analyze customer feedback, so you can gauge shoppers' satisfaction with perks, offers, and rewards. Once customers share what they'd like to see in a loyalty program or suggest things you can do better, AI agents can apply those insights immediately to uplevel your interaction with the loyal customer.

Drive Long-Term Business Value From Profitable Customers

Creating meaningful experiences that keep the customer coming back for more is incredibly valuable when you consider that it [costs six to seven times more](#) to acquire a new customer than to retain one you already have. Retailers win when they use their own trusted data and AI to offer consumers relevant and personalized offers, service, and communications at every touchpoint of the shopper journey.

When loyalty is done right, it not only solidifies customer relationships, it also improves the bottom line. This is especially important in today's economic climate. A well-designed loyalty program can provide cost-effective rewards that improve customer satisfaction. The most important question to ask when evaluating your program is, what is the value to our customers and our business?



The Salesforce logo, which consists of the word "salesforce" in a white, lowercase, sans-serif font, centered within a light blue, multi-lobed cloud shape. The background of the entire page is a gradient of blue and purple, with a faint, stylized mountain range visible at the bottom.

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