

Intro to Action Series

Introduction & Agenda

Welcome to Annex Cloud Academy. In the next few minutes, I will take you through a general overview of Action Series.

By the end of this course, you will be able to:

1. Describe what an Action Series is.
2. Explain when to use an Action Series vs. stand-alone Action Rules.
3. Configure an Action Series in the Annex Cloud LEP.

What is an Action Series?

In our previous lessons on action rules and action groups, you may have heard mention of something called an action series. Like an action group, an *action series* allows you to bind individual action rules together. However, in this case, each action rule will count as a milestone. Once all action rules in the action series have been completed, only then will the loyalty member receive the reward.

Including action series in a loyalty program can be helpful in influencing shopper behavior to meet specific business goals and KPIs. Because action series gamify the experience for loyalty members, they can encourage shoppers to engage with the brand in ways they may not have before.

For example, say your brand wants to expand its customer base, but needs more social proof to do so. By creating an action series that requires members to make 2 purchases and leave 1 review to earn bonus points, you can encourage loyal shoppers to provide that social proof. Shoppers who have made 2 purchases with the brand and might not typically leave a review, are now encouraged to do so because it will complete the action series and provide them with a reward.

Action series are a way to engage customers in a series of short-term actions that drive engagement or purchases with your brand. They can be leveraged alone, or as part of a campaign or prerequisite for a loyalty member to progress to a higher tier in the program. They should be well thought out to address the needs of your business and encourage shoppers to return to your store time and time again.

Head to the next portion of our lesson to learn how to configure an action series in the Annex Cloud LEP!

How to Configure Action Series

You will start by navigating to the Action Series dashboard from the 'Products' tab. Click 'Go' under Action Series to begin.

You'll arrive on the Action Series dashboard, where you can create a new Action Series that can group individual actions that must be completed for a customer to earn a bonus. Also, there is a table of existing configured Action Series here. In the table, you can see the Action Series Name column, which shows the name of the configured Action Series. Additionally, the ID associated with the Action Series is displayed in the Action Series ID column. The type of Action Series is shown in the Action Series Type column and displays whether the Action Series is Based on Count, Based on Points, or Based on Count and Points.

Further, the duration of the Action Series is shown in the Duration column. The list of individual action IDs included in the Action Series are displayed in the Action IDs Included column, while the total number of bonus points tied to the completion of the Action Series is listed in the Action Series Bonus Points column. The Max Achievement Limit shows how highest number of times a customer can receive the configured bonus for completing an Action Series. The Max Point Limit displays the maximum number of points a customer can earn from completing the Action Series. The Status column shows an ON or OFF flag, indicating whether the Action Series is enabled and can be completed for rewards. Lastly, the Action column allows the user to edit an existing Action Series or view the audit log to see the history of changes made to an Action Series.

To create a new Action Series, click on the Add New Action Series button at the top right of the dashboard.

You will be taken to the General Information tab first. Here you are required to give the action series a name.

Then you have the option to decide if the action series will be available for a limited time in the 'Duration' field. If you would like the action series to be available for a limited time, you can decide the number of days it is available by choosing 'Rolling' or define a date range by selecting 'Calendar'.

Next on this tab, you have the option to define the Action Series Type. The action series can be 'Based on Count' which only requires the completion of the action rules in the series. While 'Based on Points' requires members to earn a minimum number of points for the action series to be complete. You would indicate the minimum points in the 'Minimum Criteria' field that appears when selecting this option. You also have the option to have the series be 'Based on Points & Count'.

You have the option to add a URL for when this action series is active or inactive. At the time of set up the action series will be active unless you turn the 'Enabled' switch to 'OFF'.

On the General Information tab, you also have the option to include the action series in any campaigns you have configured in your loyalty program. And lastly, you can write a description of the action series, a tagline and terms and conditions you'd like to appear on site. This information will help ensure members understand the requirements of the action series, which is important to influence member behavior as intended.

Once all the general information is complete, click 'Next' to begin adding your actions to the series on the 'Series Milestones' tab.

Under 'Choose Action' you will see a drop-down menu that lists the actions you have configured in the LEP. Select the action you would like to add as a milestone. The next field says, "Should be at least". In this field you will indicate the minimum number of times you would like members to complete this action as part of the series.

If you select the 'Purchase' action from the drop-down menu, you will see two additional fields become active. The first is 'Where', which opens a drop-down menu of choices.

- If you select 'Only Count', you will only require members to complete the purchase action, regardless of spend amount or points.

- If you select 'Per Order' you will indicate a minimum of products to be purchased per order for the action to count as 'complete' in the 'Criteria' field.
- If 'Total Purchase' is selected, you will indicate a minimum spend per order in the 'Criteria' field.
- 'Base on Spend' evaluates the total the member has spent with the brand in their lifetime.
- Lastly, 'Base on Point' sets a criteria for how many points the member must earn for purchasing with the brand before the action is considered complete in the series. If you want to cap the amount of points a member can earn for the purchase action in this action series you would check the box next to 'Series Milestone Limit'. For example, if you add the purchase action to the series and select 'Base on Point' and set the point criteria to 20, then check the Series Milestone Limit box. Once the member meets that criteria and earns 20 points for completing the purchase action, they will not earn any more points for that purchase action, regardless of spend amount.

Once all the necessary fields are complete, you will click the plus sign to add the action rule to the series.

Follow this process until all action rules you'd like as part of the series have been added.

Then click 'Next' to move on to 'Series Benefits' tab.

Once on the Series Benefits tab, you'll see there are fields listed under Series Benefit Points, Series Benefit Points Limit, and Series Benefit Reward.

Under the Series Benefit Points section, in the Bonus Points field, you will indicate how many Bonus Points members can earn for completing the Action Series in the 'Points' field.

If you would like to hold the points for a number of days after the action series is completed, before awarding them to the member, you can indicate so by completing the 'Hold Points' field.

As a reminder, holding points is typically used to account for possible returns a customer may make that would alter the action completion status.

Lastly, you can set an expiration date for the bonus points awarded for completing the action series. You can set the expiration date by number of days using the 'Rolling' option or use the 'Calendar' option to set the expiration date by weeks, months or years.

Under the Series Benefit Points Limit section, there are two fields you can define. By default, a member will receive the series benefit once during the action series. A user or admin can modify the maximum achievement limit and maximum points a member can earn. Users or admins can set the Maximum Achievement Limit or Maximum Point Limit by Day, Week (Mon-Sun), Month, Year, and Anniversary options as recurring events.

Under the Series Benefit Reward section, you can use the Select Reward field to bring up a drop-down list of all the configured rewards available within your site. Select the applicable reward you'd like your members to earn when completing the Action Series.

Once you have configured the benefits for the action series, you will click 'Create New Action Series'.

Congratulations! You've successfully created an Action Series.

Takeaways

[\[Next Slide\]](#) Thanks for watching! If you remember nothing else from this lesson, keep in mind these 3 things:

1. Action series gamify the loyalty experience for shoppers. Instead of engaging with the brand once, shoppers are encouraged to return to the brand and complete the series to earn bonus points that can be used towards discounts, free products, and brand experiences.
2. Action series can be leveraged alone, or as part of a campaign or tier requirement.
3. Action series should be well thought out and configured to address specific business needs and target KPIs.