

Friction Reduction Checklist

How to evaluate and optimize incentive program experience: Use this checklist to identify friction points while ensuring alignment with both customer experience and financial objectives.

1 Program objectives and experience alignment

Goal: Ensure the experience supports both engagement and financial performance

- ☐ Are customer experience goals clearly defined
- ☐ Are financial objectives and program constraints clearly understood
- ☐ Are business rules intentionally built into the experience
- ☐ Is the level of friction aligned with program goals and risk tolerance

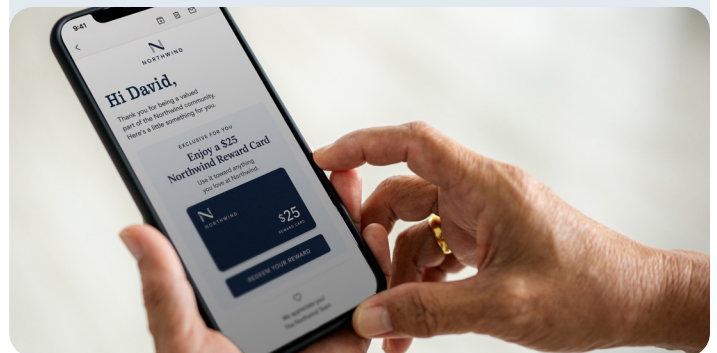
Red flag: Experience design prioritizes speed without considering financial or operational impact

3 Personalization and engagement

Goal: Create meaningful interactions that build trust and connection

- ☐ Are participant names used consistently across communications and support interactions
- ☐ Are communications tailored to the individual where possible
- ☐ Do rewards and messaging feel relevant to the participant
- ☐ Is personalization consistent across digital and live interactions

Red flag: Communications feel generic and fail to connect with participants



2 Participant journey mapping

Goal: Design a journey that reflects real participant behavior and program success

- ☐ Is the full participant journey mapped from enrollment through fulfillment
- ☐ Have baseline metrics been established for each program
- ☐ Are repeat calls, escalations, and transfers tracked and minimized
- ☐ Are successful workflows identified and replicated across programs

Red flag: Journey design is inconsistent across programs or lacks measurable success indicators

4 Claim submission experience

Goal: Reduce confusion while maintaining necessary controls

- ☐ Are claim instructions simple and easy to follow
- ☐ Are documentation requirements clearly explained
- ☐ Are submission steps intuitive and streamlined
- ☐ Are visual or guided workflows available

Red flag: High rates of incomplete or rejected claims

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Communication and status visibility

Goal: Keep participants informed and confident throughout the process

- ☐ Are confirmation messages sent immediately after submission
- ☐ Is claim status visible and easy to access
- ☐ Are proactive updates provided at key milestones
- ☐ Are timelines clearly communicated and reinforced



Red flag: Participants frequently contact support for updates

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Fulfillment speed and scalability

Goal: Deliver rewards efficiently while preparing for demand variability

- ☐ Are fulfillment timelines clearly defined and tracked
- ☐ Are operations prepared for volume surges
- ☐ Are forecasting and reporting used to anticipate demand
- ☐ Are contingency plans in place for peak activity



Red flag: Fulfillment delays increase during high volume periods

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Customer care effectiveness

Goal: Deliver complete and efficient resolutions

- ☐ Are first call resolution rates consistently high
- ☐ Do agents take ownership of participant issues
- ☐ Are agents trained to personalize interactions
- ☐ Are common issues used to improve program design



Red flag: Participants require multiple interactions to resolve issues

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Accuracy and data validation

Goal: Ensure rewards are delivered correctly the first time

- ☐ Are participant details confirmed at key touchpoints
- ☐ Are validation processes built into workflows
- ☐ Are upstream systems aligned with data requirements
- ☐ Are errors tracked and reduced over time



Red flag: Frequent delivery issues or incorrect rewards

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Self service and support balance

Goal: Improve efficiency while maintaining quality

- ☐ Are self-service tools effective for routine tasks
- ☐ Are complex issues routed quickly to live agents
- ☐ Is there a clear path from self-service to assisted support
- ☐ Is self-service adoption aligned with program goals



Red flag: Self-service creates confusion instead of reducing effort

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Continuous improvement and optimization

Goal: Continuously refine the experience based on real data

- ☐ Are calibration sessions conducted regularly
- ☐ Are insights shared across teams and programs
- ☐ Are KPIs such as NPS, participation, and fulfillment performance tracked
- ☐ Are improvements implemented based on measured outcomes



Red flag: Repeated issues persist without resolution

NOTE: THIS CHECKLIST IS INTENDED AS A GUIDE AND IS NOT ALL ENCOMPASSING. EXPERIENCE DESIGN SHOULD ALIGN WITH EACH PROGRAM'S GOALS, FINANCIAL OBJECTIVES, AND CLIENT EXPECTATIONS.