

Guest Loyalty & Recurring Revenue Audit

Self-Assessment Checklist 2026

Property Name: _____

Assessment Date: _____

Completed By: _____

Scoring Guide

 **RED** = Not in place / Critical gap  **AMBER** = Partially implemented / Needs refinement

 **GREEN** = Fully implemented / Operating effectively

1. Strategic Foundations

Item	Status	Notes
Written objective for loyalty and recurring revenue (+% repeat visits, +% spend, X members)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Key metrics tracked: repeat-visit rate, member revenue share, avg spend (members vs non-members), 90-day retention	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Current loyalty/membership activity is documented (not just informal staff knowledge)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	

Section Score:  |  | 

2. Loyalty Program – Design & Value

Item	Status	Notes
Program has clear value beyond generic discounts (recognition, access, experiences)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Benefits are simple to understand and visible at first visit (welcome perk, late checkout, seating)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Earning/ redemption rules are straightforward (one-sentence explanation)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Rewards achievable within reasonable visits/spend (not years away)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Rewards personalised by guest preferences/ behaviour (not one-size-fits-all)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	

Section Score:  |  | 

3. Loyalty Program – Operations & Technology

Item	Status	Notes
Program integrated with POS/PMS/booking systems (visits and spend captured automatically)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Members can easily view status, points, benefits (app, portal, or clear messaging)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Front-of-house staff trained to invite members, explain benefits, apply rewards	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Regular performance review: enrolment, active usage, redemptions, revenue impact (quarterly or better)	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	

Section Score:  |  | 

4. Membership / Subscription Models

Item	Status	Notes
Assessment done: does membership/subscription fit our guest base? (dining, co-working, wellness, etc.)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Membership packages clearly defined: target segment, benefits, price, usage conditions	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Financial model tested: cost structure, breakeven members, profit per member	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Members receive benefits that encourage regular visits (events, tastings, access, inclusive services)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Membership integrated with loyalty program (members also earn status or points)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	

Section Score: ● | ● | ●

5. Guest Data & Segmentation

Item	Status	Notes
Guest data collected with consent at booking, check-in, or payment (name, contact, preferences)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Guests segmented by: stay vs dine, frequency, spend level, business vs leisure	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Data used to tailor offers and communications (families vs bleisure, locals vs visitors)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Guest feedback and reviews captured and linked to profiles (not isolated comments)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	

Section Score: ● | ● | ●

6. Communication Rhythm

Item	Status	Notes
Defined communication journey around each visit: pre-arrival, during, post-stay	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Every guest receives timely thank-you message and feedback/review request after visit	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Regular but not excessive outbound rhythm (e.g. monthly update + targeted campaigns)	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Messages clear, benefit-led, adapted to guest segments and channels	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	
Automation used appropriately to ensure consistency while keeping tone warm and human	<input type="checkbox"/> ● <input type="checkbox"/> ● <input type="checkbox"/> ●	

Section Score: ● | ● | ●

7. Channels & Visibility

Item	Status	Notes
Use guest-preferred channels (email, SMS, messaging apps, app notifications); allow choice	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Loyalty and membership benefits clearly visible on website, booking engine, on-property materials	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Digital presence accurate and up-to-date across platforms; supporting direct relationships	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	

Section Score:  |  | 

8. Governance & Continuous Improvement

Item	Status	Notes
Named owner responsible for loyalty, membership and guest communication performance	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Key KPIs reviewed at least quarterly; benefits/rules/communication adjusted based on data	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	
Member feedback systematically gathered and used to refine program	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/> 	

Section Score:  |  | 

Overall Summary

Section	🔴 Count	🟡 Count	🟢 Count
1. Strategic Foundations			
2. Loyalty Design & Value			
3. Loyalty Operations & Tech			
4. Membership / Subscriptions			
5. Guest Data & Segmentation			
6. Communication Rhythm			
7. Channels & Visibility			
8. Governance & Improvement			
TOTALS			

📋 90-Day Action Plan – Top 3–5 Priority Items (RED Status Only)

Priority 1:

Owner: _____ | Deadline: _____
 Success Metric: _____

Priority 2:

Owner: _____ | Deadline: _____
 Success Metric: _____

Priority 3:

Owner: _____ | Deadline: _____
 Success Metric: _____

Priority 4 (if applicable):

Owner: _____ | Deadline: _____
 Success Metric: _____

Priority 5 (if applicable):

Owner: _____ | Deadline: _____
 Success Metric: _____

Next Steps & Review Schedule

90-Day Review Date: _____

Quarterly KPI Review (all sections): _____

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