



Bridging the Gap

How Manufacturers Drive Loyalty With Installers



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Executive Summary

Manufacturers often lack direct communication with the end users who select and install their products. The point-of-sale process remains under distributor control while installers choose products based on familiarity and availability or the best price.

A manufacturing loyalty programme establishes direct connections to address this gap, uniting three groups under one connected strategy.

- ➔ **End users (installers)** can validate their purchases to earn points which grant them access to perks, product discounts and training.
- ➔ **Distributors and wholesalers** rewards and incentives for prioritising, promoting, and purchasing the manufacturer's products, which drives incremental sales, deeper engagement, and sustained market share growth.
- ➔ **Sales teams** receive SPIFFS and scorecard incentives which reward them for achieving verified sell-out performance.

This first instalment of our three-part series presents the essential mechanics which enable these programmes to function for end-users (installers).

The framework:
Installers upload receipts or scan serial numbers for purchase verification to earn points and access rewards. This system creates a closed loop between sell-in and sell-out.

The outcome:
The programme establishes direct installer communication while providing measurable sell-out data, increasing wallet share and reducing price-focused decisions. Improved channel relationships and a first-party data resource also guide future product launches, cross-promotions and customer retention efforts.

This guide will cover tested operational systems that function without requiring complex distributor IT systems, fraud protection measures, ROI assessment examples, programme performance metrics, and a 90-day implementation schedule.



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Installer Mechanics that Actually Work

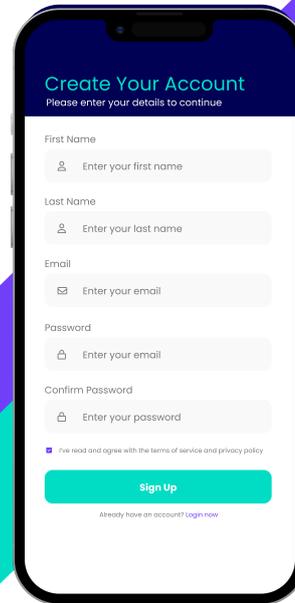
Effective installer programmes work because they fit into installers' existing workflows. They make it easy to sign up and get rewarded. Here's how to build that experience.

Joining the programme

Keep the registration process simple for all users. Use multiple entry points: QR codes on product packaging and codes at point-of-sale displays for instant installer enrolment or have a place on your site to allow installers to register details and sign up for your reward programme.

Work with distributors to include landing page links on their receipts and in email promotions. You can also send SMS and email invitations with "magic link" single sign-on, so users get instant access to the system without needing to remember passwords.

WhatsApp integration and Apple Wallet passes also mean installers don't have to download yet another app.



Earning points

Installers need to prove two things: they bought your product, and they installed it. Make both easy.

For proof of purchase, let them upload PDFs or snap photos of receipts. Optical character recognition (OCR) technology automatically pulls out the key details (SKU, brand, total spend, VAT number, and date). Verification happens in seconds, and points hit their account either instantly or after a short validation period.

Use serial numbers or QR codes for high-value items like boilers or heat pumps. When installers scan a serial plate or QR code, you log the install and award bonus points. It's a win-win: warranty registration protects the customer while rewarding the installer.

Strengthen your relationship by rewarding actions beyond purchases:

- ➔ **Training completion** – Award points when installers complete CPD courses, toolbox talks, and product certifications.
- ➔ **Product reviews** – Recognise installers who write reviews about new product ranges.
- ➔ **Referrals** – Reward installers who refer members to the programme.
- ➔ **Specification behaviour** – Reward installers with bonus points when they specify your brand in quotes or present your products directly to customers.

These non-transactional rewards keep installers engaged between purchases while improving their expertise with your product line.

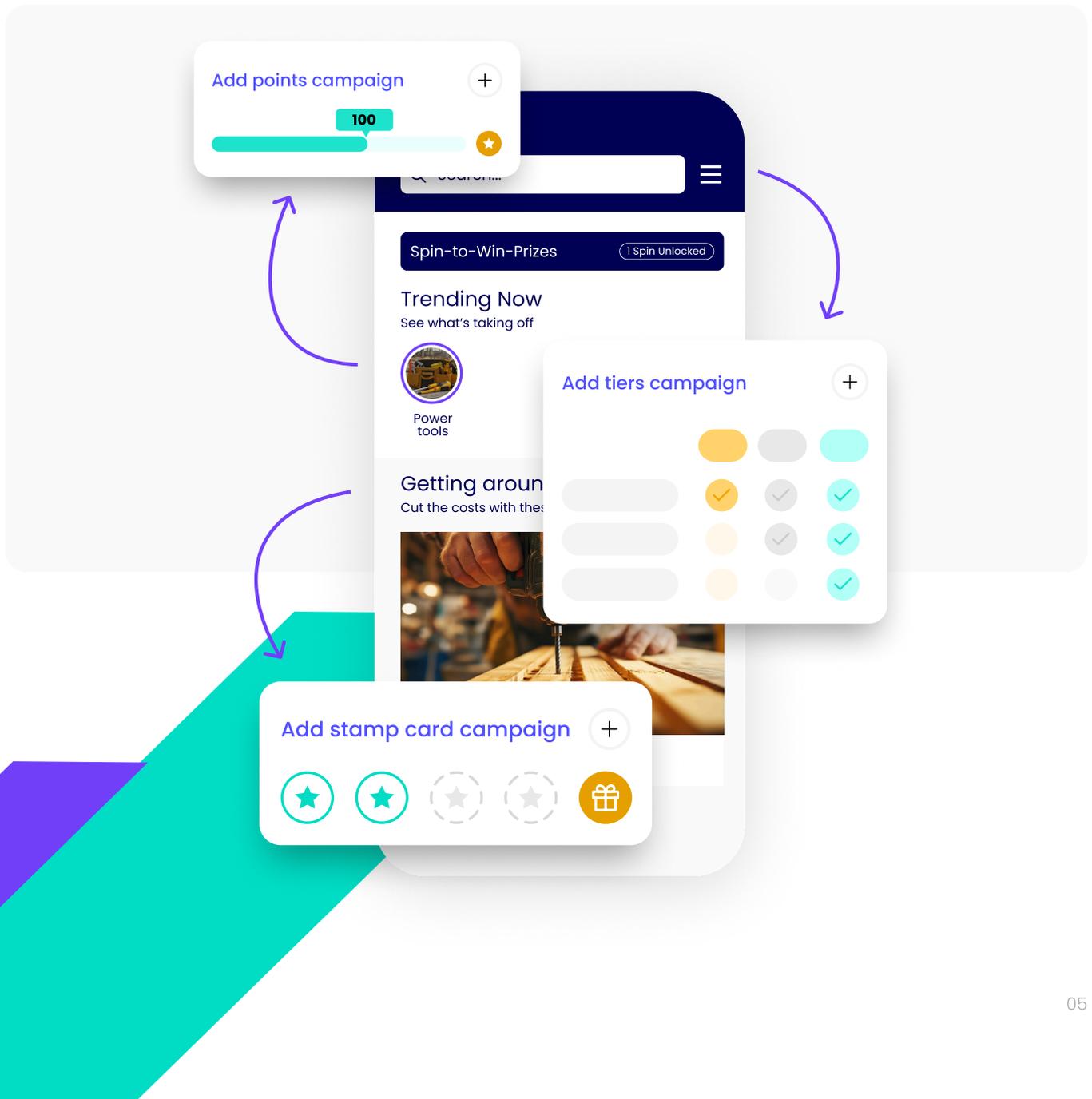
↻ The value exchange: what installers can redeem

The value exchange: what installers can redeem

- ➔ **Trade essentials** – Power tools, hand tools, consumables, PPE, workwear, van supplies, fuel cards and extended warranties. These rewards reduce business expenses while providing immediate practical value to installers.
- ➔ **Professional development** – Training credits, CPD courses, and priority support. Help installers grow their business while reducing risk.
- ➔ **Lifestyle and cash rewards** – Vouchers, prepaid cards, experience days, and popular electronic devices. Not trade-related, but they deliver personal value to installers who have diverse interests.

Add tiered status to points systems to create even more value. Let installers progress through Silver, Gold, and Platinum tiers based on their annual sales and verified installations. Higher tiers unlock better earn rates. Give Silver installers 1 point per £1 spent, but bump Gold members to 1.25x and Platinum to 1.5x.

Tiered systems create a clear achievement path for advancement, which strengthens their dedication to your brand. Once an installer hits Platinum status, they'll work hard to stay there. That means repeat business and a higher wallet share.



Gamification & Campaigns for Installers

You need real incentives to keep installers loyal. Combine gamification with targeted campaigns to turn a basic loyalty scheme into something that actively drives the behaviour you want.

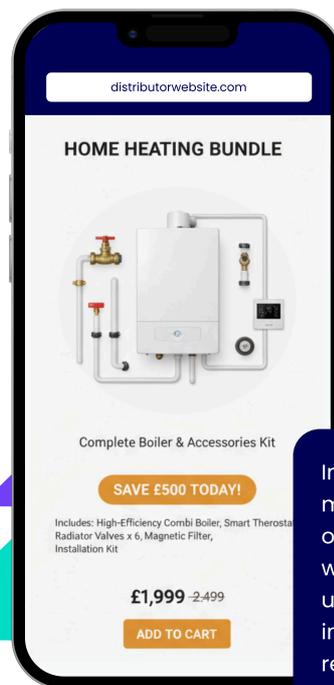
Bundles and new product launches

Use targeted campaigns to hit specific business targets. Are you introducing a new heat pump product line? Create a bundle promotion:

"Install a heat pump system with controls during the first 30 days after purchase, and earn double points."

You'll get the product into the field faster while getting installers familiar with your latest tech.

Product bundles also help customers purchase more items at once. Award bonus points when installers buy complementary items together (e.g., radiators + valves or adhesive + grout). The approach benefits both sides: the installer earns more points, and you boost cross-category sales and average transaction values.



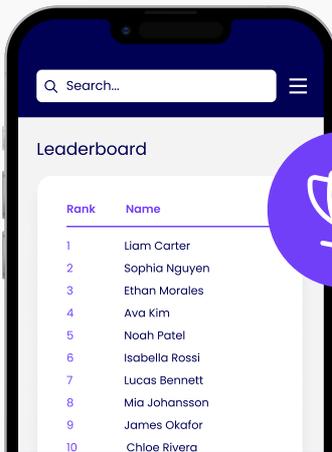
Installer purchases manufacturer bundle offer on distributor website, scans and uploads receipt / invoice to manufacturer rewards programme to earn points or rewards.

Seasonal campaigns

Time your campaigns around installers' natural work rhythms and key dates. Run a "Summer Site Season" promotion during peak installation months with bonus points on high-margin SKUs. Launch a "12 Days of Rewards" in December with daily prize draws and flash bonuses to keep installers engaged when work's slower.

Black Friday and end-of-quarter pushes create urgency. Limited-time offers like "This week only: triple points on smart heating controls" get installers to act fast. These seasonal campaigns keep your programme fresh and give installers new reasons to stay active all year round.

Local and regional leaderboards



Encourage installer participation with regular leaderboards that show top performers by region and branch. Reward the top 10 with premium prizes like quality tools, weekend breaks, or exclusive experiences.

Keep it fair by splitting leaderboards regionally. A sole trader in Cornwall shouldn't compete against a large firm in London.

Leaderboards also create social proof. When installers see their peers winning, they're more likely to join in themselves. Set clear reward limits to control costs, and rotate the categories regularly (switch from "most new product installs" to "highest category breadth") so different installer types get a chance to win.

Streaks and badges

Digital badges are cheap but effective for recognition. Award them for milestones like:

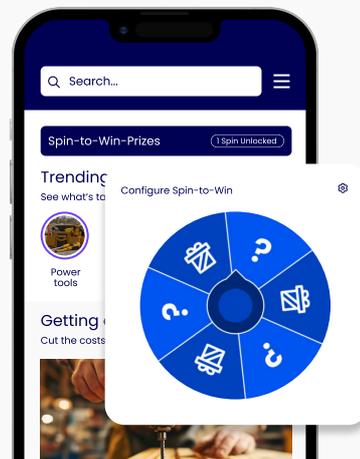
- "5 Months Verified"** for consistent participation
- "Training Complete"** for finishing CPD modules
- "Brand Advocate"** for referrals

These visible wins give installers something to be proud of as they work to collect them all. Streak bonuses also keep people coming back: give installers who maintain 12 consecutive months of activity automatic Platinum tier access.

Instant win moments

Build stronger emotional bonds with installers through unexpected reward experiences. Create a "spin-to-win" wheel which activates when installers submit their first invoice each month. They could win bonus points, £10 vouchers, or branded gear. The small rewards cost little yet create real goodwill.

Flash bonuses work the same way. Reward all active installers with surprise point drops when you reach specific regional or national sales goals: "Congratulations! We reached 10,000 installs during this quarter—here's 500 bonus points."



Fraud Controls, GDPR & Data Design

Installers share sensitive business information with you, including project details, invoice and VAT numbers. Proper handling protects both installer trust and your programme investment. Get it wrong and you'll face fraud, regulatory penalties, and loss of trust.

This section outlines what data to collect, claim verification methods, and basic data handling practices that maintain compliance.

Data capture essentials

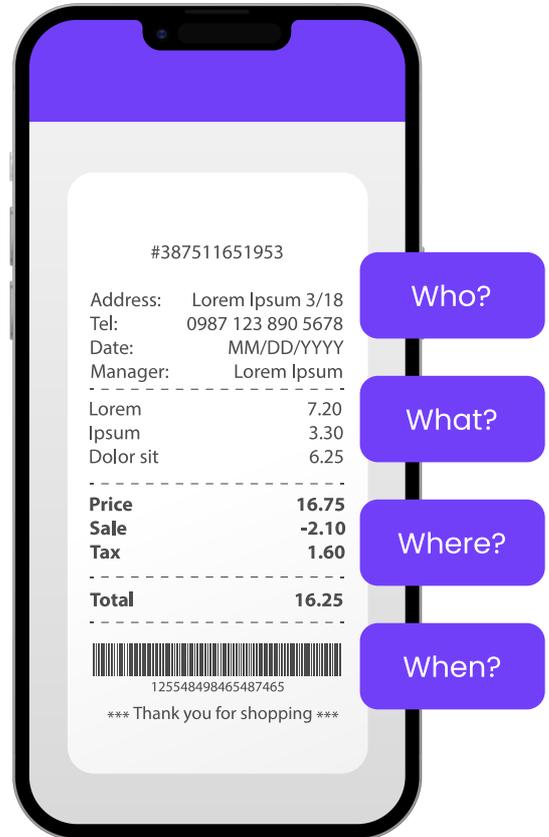
Keep it simple and collect only essential information: first name, trade type, company name, region or postcode, and preferred distributor(s). The system should also allow users to enter their VAT number for business verification.

The overall registration process should remain brief to boost the number of completed sign-ups.

Invoice specification and verification

Demand that installers upload receipts which contain supplier information, purchase dates and detailed line items showing SKUs, totals, and VAT rates. Photos work fine as long as the content is readable.

The OCR rules engine verifies extracted data by checking if the date falls within acceptable parameters, if the supplier exists in your merchant list, and if product SKUs match your catalogue.



Fraud controls

Build in multiple layers of security to catch fraudulent claims:

- **Duplicate detection** – Hash checks flag when installers submit the same invoice multiple times
- **Claim frequency limits** – Cap consecutive-day claims to prevent unrealistic submission patterns
- **Altered invoice detection** – Edit-distance algorithms catch slightly modified fraudulent claims
- **Manual review queue** – Route suspicious claims to your team for human verification
- **Geofencing** – Spot anomalies like the same invoice being submitted from different locations

Privacy and GDPR compliance

You can run your programme under legitimate interests, but you'll need explicit consent for marketing communications. Be upfront about your terms. Tell installers how long you'll keep their data and build privacy into your system from the start.

You'll also need Data Processing Agreements with any third-party processors handling installer information. For installers who require it, offer UK or EU data storage options to meet regional requirements.

Architecture approach

Build your foundation first: a secure upload portal with OCR and rules-based validation feeding into a points engine. Once you've got that running smoothly, add distributor Electronic Data Interchange (EDI) or Application Programming Interface (API) feeds to automate data flow.

The key is linking every claim to a single Installer ID. This lets you track lifetime value and run segmentation analysis.

Summary Table: Challenges, Opportunities & Programme Features

This table shows how B2B installer loyalty programmes turn your biggest challenges into opportunities and which features actually make that happen.

Challenge	Opportunity	Programme Feature
<p>Indirect customer relationships – You sell into distributors; distributors sell out to installers. You see orders, not usage. You don't know who installed what, where, or why you were chosen. This creates a blind spot in loyalty and marketing.</p>	<p>Treat installers like direct customers – Even if sales flow through the channel, manufacturers can engage installers as if they were retail customers.</p>	<p>Receipt scanning and product registration; installer sign-up with unique ID; incentives that:</p> <ol style="list-style-type: none"> 1. Identify installers, 2. Verify purchases, 3. Reward target behaviours, 4. Credit the channel for facilitation.
<p>Data gaps and limited insights – Without direct installer contact, you lack visibility into purchase patterns, geographic concentration, competitive threats, or opportunities for cross-sell and retention.</p>	<p>Create a first-party data asset – The programme builds a proprietary installer database you can segment, target, and retain over time.</p>	<p>Points and tier systems that generate first- and zero-party data; claim verification via OCR feeding analytics dashboards; behavioural tracking (frequency, category breadth, SKU preferences).</p>
<p>Few natural touchpoints – Once a distributor relationship is established, manufacturers have limited reasons to interact with installers directly. Product issues prompt contact, but positive engagement is rare.</p>	<p>Build ongoing engagement loops – Loyalty programmes create regular interaction points that keep your brand front-of-mind throughout the purchase cycle.</p>	<p>Gamification elements (streaks, badges, leaderboards); seasonal challenges and campaigns; monthly "claim and win" promotions; training modules; tier status updates and milestone celebrations.</p>
<p>Commoditisation and price pressure – When installers view products as interchangeable, they default to the cheapest available option. Brand preference erodes, and you compete on price alone.</p>	<p>Shift competition from price to value – Rewards, status, and exclusive perks create differentiation beyond product specifications and cost.</p>	<p>Experiential rewards and tier-based status recognition; targeted point multipliers on strategic or premium SKUs; exclusive access to training, events, or new product previews; financial perks like extended warranties or priority support.</p>
<p>Fragmented installer base – Thousands of small independent firms and sole traders are expensive and difficult to reach through traditional marketing or sales channels.</p>	<p>Scale engagement efficiently – Digital programmes reach dispersed installers at low marginal cost, creating economies of scale impossible with field sales alone.</p>	<p>Mobile-first, self-serve programme architecture; QR code onboarding from packaging or receipts; magic-link single sign-on; Apple Wallet or WhatsApp integration for app-less access.</p>
<p>Slow or irrelevant rewards – If benefits are delayed (end-of-year rebates) or impractical (lifestyle-only vouchers with no trade value), they won't change daily purchase decisions.</p>	<p>Deliver immediate, relevant value – Fast point crediting and trade-specific rewards create tangible impact on installers' businesses and personal lives.</p>	<p>On-demand redemption with no waiting periods; trade-relevant rewards (tools, PPE, fuel, training credits, consumables); tier perks that provide business enablement (priority tech support, extended warranties, marketing funds); flexible reward catalogue mixing practical and aspirational items.</p>
<p>Rising business overheads – Installers face increasing costs for tools, liability insurance, fuel, CPD training, and compliance. Programmes that offset these pressures win loyalty.</p>	<p>Position your brand as a business partner – When rewards directly reduce installer operating costs, your programme becomes essential to their business model.</p>	<p>Rewards that offset core expenses (tools, fuel vouchers, PPE, van equipment); CPD training bonuses and certification support; extended warranty coverage as a tier perk; priority technical support reducing job delays and comebacks.</p>

What to Reward (and What Not to)

Knowing what to reward and what to avoid keeps costs down and encourages the right behaviours. Here's where to focus your budget for the best results.

High-value behaviours to reward

Focus your points budget on actions that drive strategic outcomes:

- ➔ **Verified purchases of target SKUs** – Prioritise premium ranges, new launches, or products with higher margins
- ➔ **New product trials** – Accelerate adoption of recently launched lines with bonus point campaigns
- ➔ **Repeat purchase patterns** – Reward frequency to build buying habits
- ➔ **Cross-category expansion** – Push installers beyond single categories (e.g., flooring only) into full system solutions (boilers + controls + accessories)
- ➔ **Training completion** – Points earned for CPD courses, product certification or safety qualifications completed
- ➔ **Documented installs** – Bonus points for uploading site photos with project names, proving real-world application
- ➔ **Referrals** – Reward installers who bring peers into the programme, creating organic growth

What not to over-reward

Don't waste budget on low-impact behaviours:

- ➔ **Low-margin SKUs without strategic value** – Don't subsidise products that barely turn a profit
- ➔ **Unverified claims** – Never award points without proof. This invites fraud and weakens your programme
- ➔ **Actions that would happen anyway** – Be cautious of rewarding baseline behaviour that doesn't require incentive (cannibalisation risk)

Calibration guide

A typical earn rate is 1 point per £1 verified spend, where 100 points = £1 reward value. That's roughly 1–2% effective reward cost.

Tier perks often deliver better cost-to-impact ratios than simply increasing earn rates. Use limited-time multipliers (double or triple points) to launch new ranges, crack competitor-held accounts, or drive seasonal volume without permanently raising programme costs.

Measurement & ROI: How to Prove Impact

Your success metric is simple: incremental verified sell-out and a clear picture of who's buying, where, and how often. This section explains how to measure performance, prove ROI, and build the business case for scale.

Core KPIs

➔ Installer metrics:

Total registrations, verified claims submitted, claim frequency per installer, average transaction value, share-of-wallet proxy (measured by category breadth—how many product lines each installer purchases).

➔ Programme economics:

Reward cost as a percentage of attributed sales, platform and operational costs, and incremental gross margin generated.

Worked Example of ROI Calculation

Here's an example to illustrate how installer programmes generate measurable returns. Including how results can vary across different adoption and performance scenarios.

Assume 20,000 target installers with an average verified annual spend of £4,800 each, representing a £96.0 million baseline sell-out.

Year 1:

30% onboard (6,000 installers). The programme drives a +10% spend lift among participants → £2,880,000 incremental revenue.

- Reward cost at 1.5% of verified sales: $6,000 \text{ installers} \times £4,800 \times 1.1 \times 1.5\% \approx £475,000$
- Platform, operations, and communications: £200,000
- **Total programme cost: £675,000**
- Gross margin at 30% on incremental revenue: £864,000
- **Year 1 ROI:** $(£864k - £675k) = \text{+£189,000}$ (28% return, even in build year)

Year 2:

30% onboard (6,000 installers). The programme drives a +10% spend lift among participants → £2,880,000 incremental revenue.

- Incremental revenue: $10,000 \times £4,800 \times 1.1 - 10,000 \times £4,800 = £4,800,000$
- Reward cost: $10,000 \times £4,800 \times 1.1 \times 1.5\% \approx £792,000$
- Platform and ops: £150,000
- **Total cost: £942,000**
- Gross margin: $£4,800,000 \times 30\% = £1,440,000$
- **Year 2 ROI:** $(£1,440k - £942k) / £942k = \text{53% positive return}$

Takeaway:

At scale, even Year 1 shows positive returns. Use tiered perks, automation, and distributor EDI integration to lower operational costs while increasing engagement and speeding up payback in Year 2 and beyond.

Roll-Out Plan (90-Day Pilot → Scale)

A phased rollout gets your programme live fast and scales efficiently. Start small, validate assumptions, then expand with confidence.

Phase 0 (Weeks 1–4): Foundation >

- Set KPIs, reward economics, and legal terms for the programme.
- Design creative assets and onboard the reward catalogue.
- Establish privacy compliance and clarify T&Cs.

Phase 1: Pilot (Days 1–90) >

- Launch with two hero SKUs plus one product range.
- Run weekly internal huddles to monitor progress.
- Deploy a simple WhatsApp and QR toolkit for installer onboarding.
- Use manual invoice validation supplemented by light automation.

Phase 2 (Months 4–9): Expand >

- Refine rules based on pilot feedback.
- Add distributor EDI feeds, introduce tiering, and roll out nationally with seasonal campaigns.
- Deploy a simple WhatsApp and QR toolkit for installer onboarding.

Phase 2 (Months 4–9): Expand >

- Fine-tune earn rates.
- Introduce category breadth goals.
- Deploy advanced fraud controls (ML anomaly detection, geofencing).
- Launch regional leaderboards.
- Review KPIs monthly and keep iterating.

Case Study: Worcester Bosch – VAULT

How it works

Worcester Bosch’s installer loyalty programme demonstrates how a mature manufacturer scheme evolves with market demands. In September 2025, the company rebranded its five-year-old Excelerate programme to VAULT, reflecting a strategic shift from gas-boiler-focused rewards to multi-technology recognition across gas, oil, heat pumps, air conditioning, and hybrid systems.

The VAULT loyalty programme is designed specifically to overcome the limitations of an indirect sales channel by creating a direct data-gathering and engagement loop with installers.

Redemption flexibility

Points convert to four reward types.

- ④ **The Worcester Bosch-branded Mastercard** (a reloadable prepaid card) offers maximum flexibility for cash-equivalent spending
- ④ **The Rewards Shop** stocks trade essentials (tools, workwear, and training courses).
- ④ **Multi-brand gift cards and vouchers** provide lifestyle value.
- ④ **Business support redemptions** unlock marketing materials, lead generation services, and certification badges.

Tiered progression

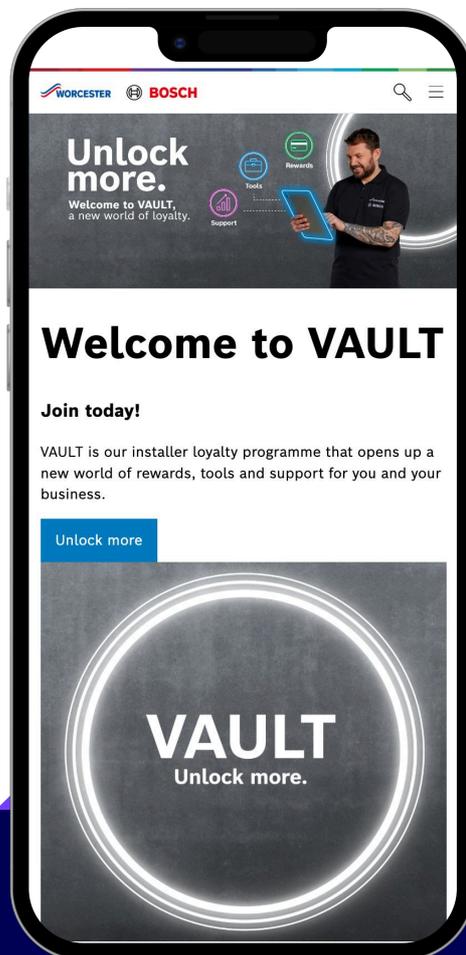
Three levels create advancement goals. Entry-level Installer status opens the programme to all qualified engineers. Accredited Installer status—requiring completion of Worcester training courses—unlocks extended guarantees (7-12 years), directory listing for customer leads, and priority technical support.

Accredited Partner status rewards sustained quality and volume with maximum guarantees, premium directory placement, exclusive events, and enhanced finance options for heat pumps.

Active campaigns

The PowerUp Supercharged promotion (July 2025–April 2026) offers up to £1,500 for installing additional units versus the prior year, explicitly including heat pumps alongside traditional boilers.

This multi-technology incentive structure motivates installers to acquire new skills whilst still rewarding existing skills. It shows how established programmes adapt to support industry transitions toward low-carbon heating.





Conclusion – Building Your Direct Route to Market

Installer loyalty programmes give manufacturers a direct line to the people who decide which products go to job sites. These programmes build measurable loyalty, richer first-party data, and clear ROI by addressing core issues like indirect relationships, fragmented installer bases, and price-driven buying.

You can stop competing only on price and start building brand preference by using mechanics that fit into daily workflows, campaigns that keep installers engaged, and rewards that give real value. The outcome is deeper market intelligence and scalable growth anchored in installer advocacy.

Coming next: Part 2 of this series examines how manufacturers can design loyalty and incentive programmes for distributors and wholesalers (mobilising the middle of the value chain to activate installer programmes, share sell-out data, and drive strategic product priorities).



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