

Internal Stakeholder Alignment Checklist

Get marketing, IT, finance, legal, and operations aligned before vendor outreach begins.

Why this matters

A loyalty platform decision touches more departments than the team running the evaluation usually expects. Looping in the right stakeholders early — before vendor responses come in, not after a contract is on the table — prevents a strong-looking vendor from stalling out in legal or finance review months into the process.

Which sections route to which stakeholders

Section	Primary Stakeholder(s)	Why
1. Technical Architecture & POS Integration	IT / Engineering	POS certification and API architecture are technical sign-off items.
2. Platform Reliability & Infrastructure	IT / Engineering	Uptime, DR, and hosting posture are infrastructure risk questions.
3. Customer Data, CDP & First-Party Ownership	IT, Legal	Data ownership and compliance (SOC 2, PCI, CCPA, GDPR) require legal review.
4. Loyalty Program Management	Marketing / Loyalty	Program mechanics are owned by the team running the loyalty strategy.
5. Stored Value & Gift Card Management	Finance, Marketing	Liability reporting and escheatment compliance are finance-owned risks.
6. Offer Management, AI & Decisioning	Marketing, IT	AI data usage policy should also be reviewed by legal before signature.
7. Marketing Automation & Channel Delivery	Marketing	Campaign and channel capabilities are marketing's operational domain.
8. Enrollment & Member Experience	Marketing, Operations	POS enrollment flow affects front-line staff and store operations.
9. Finance-Ready Reporting & ROI	Finance, Marketing	ROI and lift reporting must satisfy finance's own measurement standards.
10. Implementation, Migration & Support	IT, Operations	Timeline and migration risk affect both technical and store-level teams.
11. Commercials, Contract & Vendor Risk	Legal, Finance, Procurement	Contract terms, pricing, and exit rights require legal and finance sign-off.

Before sending anything to vendors, confirm:

- Marketing/loyalty has defined the program requirements driving this evaluation.
- IT has reviewed the technical architecture and POS integration requirements.

- Finance has reviewed stored value liability and ROI reporting requirements.
- Legal has flagged the contract terms and compliance requirements that must be addressed (Section 11).
- Operations has weighed in on enrollment experience and implementation timeline impact on stores.
- Procurement is aware of the evaluation timeline and any internal RFP process requirements.
- A single internal owner has been assigned to consolidate stakeholder input into one scorecard.

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