

DATA STRATEGY

FIRST-PARTY CONVERSION PLAYBOOK

WORKSHEET

Owning Your Guest Relationships in a
Privacy-First World



paytronix
an access company

1. Where Does Your Guest Data Live?



Third-party cookies are disappearing. Privacy regulations are tightening. Use this assessment to evaluate where your guest data currently lives and where the gaps are.

Data Source	Have It?		Connected to Other Systems?			Guest Consent Captured?	
	NO	YES	NO	PARTIAL	YES	NO	YES
Loyalty program (transactions, preferences, tiers)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online ordering (orders, frequency, items, dayparts)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile app (behavior, engagement, push opt-in)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
POS transactions (in-store purchases)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Email/SMS (engagement, preferences, opt-in)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Website (browsing, account data)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guest feedback/surveys	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Current % of transactions tied to a known guest: %

Current loyalty program capture rate: %

Email/SMS opt-in rate among known guests: %

% of guests recognized across 2+ channels: %

Primary gap in guest identification: _____

Biggest barrier to data unification: _____



Companies with unified first-party data see 9.5% year-over-year revenue growth; nearly 3X the rate of those with fragmented guest data. This gap compounds every year.

2. What Can You Do With Your Data Today?



First-party data enables specific marketing capabilities. Check what you can do today, what you want to do, and identify the gaps.

Capability	Can Do Today?		Want to Do?		Gap?	
	NO	YES	NO	YES	NO	YES
Personalized offers: based on actual purchase history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lapsed guest recovery: identify and win back guests before they churn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cross-channel attribution: track full journey from ad to app to store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loyalty ROI measurement: prove incremental lift from program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guest lifetime value: calculate and optimize LTV by segment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AI-powered recommendations: next-best-offer or menu suggestions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Real-time triggered messaging: send offers based on behavior as it happens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Your top 3 capability priorities (check 3):

- | | |
|--|--|
| <input type="checkbox"/> Personalized offers | <input type="checkbox"/> Guest lifetime value |
| <input type="checkbox"/> Lapsed guest recovery | <input type="checkbox"/> AI-powered recommendations |
| <input type="checkbox"/> Cross-channel attribution | <input type="checkbox"/> Real-time triggered messaging |
| <input type="checkbox"/> Loyalty ROI measurement | |

Total capabilities with gaps: / 7

- **If 4+ gaps:** Your data infrastructure is limiting marketing effectiveness. Prioritize unification.
- **If 2-3 gaps:** Targeted investments can close specific capability gaps.
- **If 0-1 gaps:** Focus on optimization and advanced use cases.

3. Your 90-Day First-Party Data Roadmap



Select your quick wins and assign owners. Most operators can meaningfully improve their known guest rate within 90 days.

Quick Wins (check 2-3 to prioritize):

- Increase loyalty capture rate at POS (staff training, prompts, incentives)
- Add email/SMS capture to online ordering checkout flow
- Connect loyalty program to online ordering data (if currently siloed)
- Implement guest account creation incentive (points, discount, exclusive access)
- Audit and merge duplicate guest profiles
- Enable single sign-on across app and web
- Add clear consent capture to all data collection points

Action	Owner	Due Date	Status
Quick Win #1: _____	_____	___/___/___	<input type="radio"/> Not Started <input type="radio"/> In Progress <input type="radio"/> Complete
Quick Win #2: _____	_____	___/___/___	<input type="radio"/> Not Started <input type="radio"/> In Progress <input type="radio"/> Complete
Quick Win #3: _____	_____	___/___/___	<input type="radio"/> Not Started <input type="radio"/> In Progress <input type="radio"/> Complete

Metric	Current	90-day Target
Known guest rate (% of transactions)	_____ %	_____ %
Loyalty capture rate	_____ %	_____ %
Email/SMS opt-in rate	_____ %	_____ %



The goal isn't 100% identification. It's having enough data to personalize meaningfully. Most mature programs target 60-70% known guest rate as a practical benchmark.

4. Tracking Progress and Building the Foundation



First-party data maturity compounds over time. Use this framework to track progress and identify when you're ready for the next level.

Review date (recommend first week of each month): ___/___/___

- Did known guest rate increase or decrease? Why? _____
- Which channels captured the most new guest data this month? _____
- What's blocking guests from identifying themselves? _____
- Are connected systems staying in sync? _____
- Which capability gaps closed? Which remain? _____

Level	Characteristics	You're Here If...
1. Foundational	Data exists but lives in silos; limited guest identification	<30% known guest rate; no cross-channel view
2. Connected	Systems integrated; unified guest profiles emerging	30-50% known guest rate; basic personalization
3. Activated	Data drives marketing decisions; personalization at scale	50-70% known guest rate; predictive capabilities
4. Optimized	AI-powered insights; real-time responsiveness; continuous improvement	70%+ known guest rate; full attribution visibility

My current level: 1 2 3 4

My target level in 12 months: 1 2 3 4

First-party data strategy requires systems that talk to each other. If your loyalty program, online ordering, POS, and marketing tools operate in silos, you're collecting data you can't use.

A unified guest engagement platform connects these touchpoints into a single guest profile, capturing behavior across channels, enabling personalization at scale, and ensuring you own the relationship.

Ready to build your first-party data foundation?

See how Paytronix unifies guest data across loyalty, ordering, and marketing into actionable insights giving you the personalization power to thrive in a privacy-first world.



Paytronix.com



Paytronix.com/demo



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