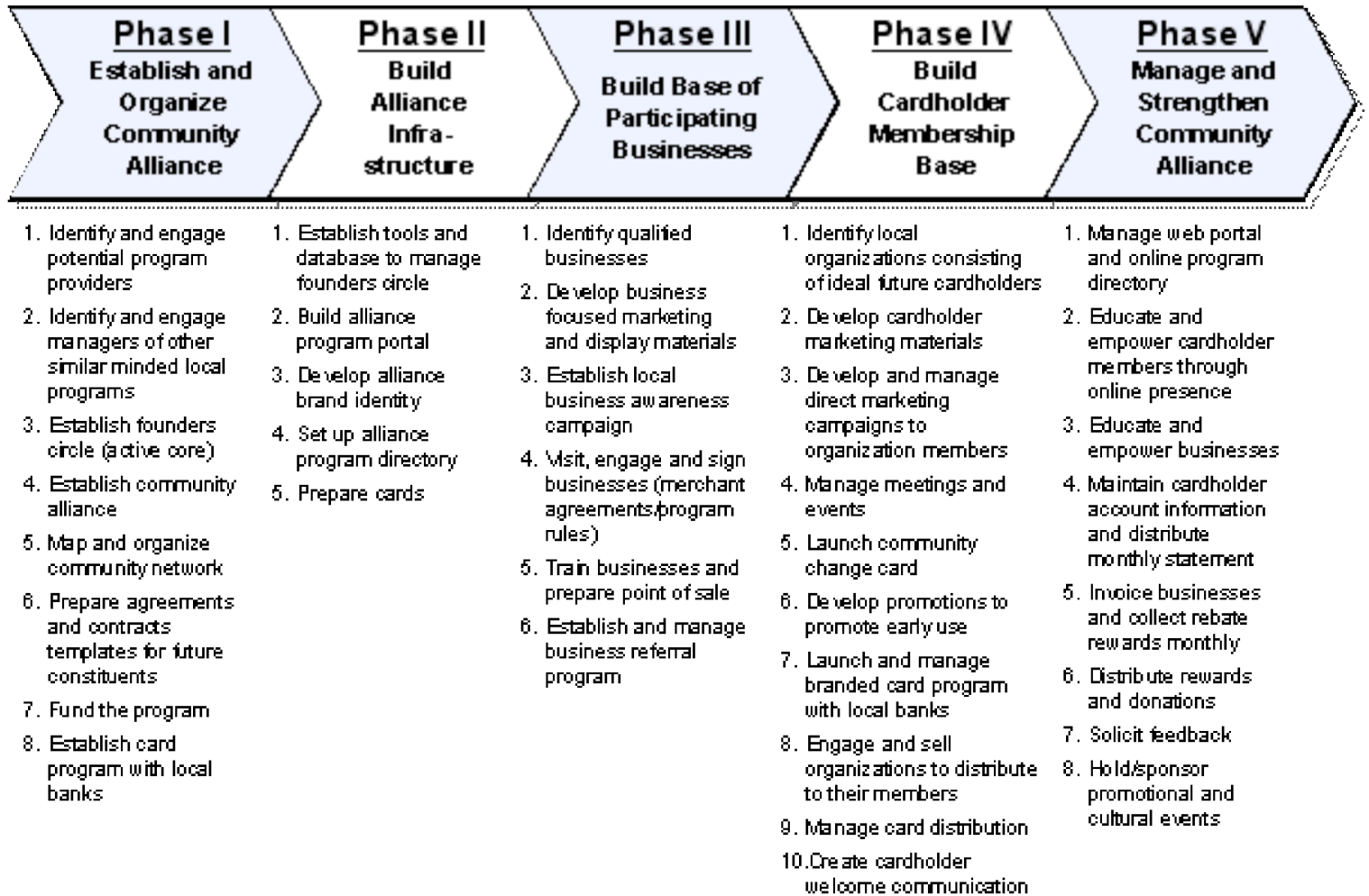


## Alliance Launch Plan Framework



## **I. Establish And Organize Community Alliance**

- 1) Identify and engage potential program partners
- 2) Identify and engage managers of other similar minded local programs
- 3) Establish founders circle (active core)
- 4) Establish community alliance
  - a) Establish shared vision within the core group
  - b) Align purpose, principles and objectives
  - c) Identify phases, stages, components and roles
  - d) Locate and prepare alliance headquarters
- 5) Map and organize community network
  - a) Identify and engage local not for profits
  - b) Identify and engage local bank partners
  - c) Identify and engage business sponsors
  - d) Identify and engage local foundations and donors
  - e) Identify and engage local government
- 6) Prepare agreement and contract templates for future constituents
- 7) Fund the program
  - a) Identify sources of funding
    - \_ Foundations (grants)
    - \_ Government
    - \_ Business sponsors (donations)
  - b) Develop alliance budget and revenue forecasts
  - c) Solicit potential sources of funding
  - d) Manage relationships and develop agreements
- 8) Establish card program with local banks
  - a) Introduce program to bank
  - b) Secure connection plan
  - c) Issue co-branded card

- d) Overlay program on existing bank cards
  - \_ Existing credit cards
  - \_ Existing debit cards
- e) Train bank staff

## **II. Build Alliance Infrastructure**

- 1) Establish tools and database to manage founders circle
  - \_ Expanded wiki site (e.g. Jotspot)
  - \_ Salesforce
  - \_ Mindmanager
- 2) Build alliance program portal
  - \_ Account management
  - \_ Card ordering
  - \_ Business enrollment
  - \_ Not for profit enrollment
- 3) Develop alliance brand identity
  - a) Locate and hire local artist
  - b) Develop artwork for web portal, materials and cards
- 4) Set up alliance program directory
- 5) Prepare cards
  - a) Locate artist
  - b) Design cards

### **III. Build Base Of Participating Businesses**

- 1) Identify qualified businesses
- 2) Develop business focused marketing and display materials
- 3) Establish local business awareness campaign
  - a) Design and execute local marketing campaign
  - b) Sponsor business focused events
- 4) Visit, engage and sign businesses (merchant agreements/program rules)
- 5) Train businesses and prepare point of sale
  - a) Enter merchant agreements into merchant management system
  - b) Add businesses to directory
  - c) Delivery display materials and cards for distribution
  - d) Train manager and cashier
  - e) Conduct test swipe/verify Interra system account info and log-on
- 6) Establish and manage business referral program
  - a) Determine program terms
  - b) Develop materials for each constituency group
    - \_ Businesses
    - \_ Beneficiaries
    - \_ Banks
    - \_ Cardholders
  - c) Engage each constituency

#### **IV. Build Cardholder Membership Base**

- 1) Identify local organizations consisting of ideal future cardholders
- 2) Develop cardholder marketing materials
- 3) Develop and manage direct marketing campaigns to organization members
- 4) Manage meetings and events
- 5) Launch community change card
- 6) Develop promotions to promote early use
  - a) Business to customer
  - b) Direct to cardholder
- 7) Launch and manage branded card program with local banks
- 8) Engage and sell organizations to distribute to their members
  - \_ Direct to cardholders
  - \_ Through beneficiaries/not for profits
  - \_ Through schools
  - \_ Through participating businesses
  - \_ Through city agencies
  - \_ Other groups/organizations
- 9) Manage card distribution
- 10) Create cardholder welcome communication

## **V. Manage and Strengthen Community Alliance**

- 1) Manage web portal and online program directory
- 2) Educate and empower cardholder members through online presence
  - a) Identify group deals/rewards for cardholders
  - b) Monitor relevant local issues and publish articles
  - c) Publish monthly cardholder communication
- 3) Educate and empower businesses
  - a) Write and distribute monthly communication
  - b) Screen/organize customer data
  - c) Provide customer data and insight to businesses
- 4) Maintain cardholder account information and distribute monthly statement
- 5) Invoice businesses and collect rebate rewards monthly
- 6) Distribute rewards and donations
  - a) Write checks
    - \_ Cardholders
    - \_ Beneficiaries
    - \_ Program partners
  - b) Authorize payments
- 7) Solicit feedback
  - a) Participate in and monitor card member online discussions
  - b) Survey businesses
- 8) Hold/sponsor promotional and cultural events