

Recommended Activation Communications Plan



Planning & Segmentation

• Visa Retail Branch Program with Customer Materials, e.g. take-ones, posters, tent cards, and sweepstakes
 • Education Materials, Training, and Incentive Program for Branch Associates

Card Carrier

- **Carrier**
- **Letter** (if possible)
- **Insert** (if possible) with rewards education if applicable

Stress activation & first use

Follow-up Authentication DM - Reinforce activation

Follow-up Authentication Email - Reinforce activation

Welcome Kit

- **Letter**
- **Benefits Guide**, with rewards education if applicable and/or Visa Extras enrollment

Include Merchant Offer

Follow-up Activation DM - with Visa Merchant Offer Program

Follow-up Activation Email - with Visa Merchant Offer Program

Follow-up Activation Call

Rewards or Visa Extras Spend & Get Activation DM

Rewards or Visa Extras Spend & Get Activation Email

OR

Forced Billing Statement with a \$10 Credit

Statement Insert & Message
 Activation with \$10 credit message

Customer Service Letter encouraging activation

Customer Service Email encouraging activation

Visa Small Business Customer Microsite with Merchant Offer pages

Ongoing Tracking & Analysis

Channels: Online/Email Statement Direct Mail (DM) In-Branch/CSR

Activation Plan

Key Activities



- **Planning & Segmentation**

Visa offers many powerful tools to help define marketing plans and audience segmentation. Some include:

- Visa acquisition strategies guides for small businesses
- Benchmarking tools including Financial Planners and VisaVue
- Small business research and target audience profiles

- **Execution**

These communication tactics provide a comprehensive approach to an activation campaign.

Note: The recommended plan is based on general best practices, however should be customized with tactics that meet your program needs, challenges, and requirements.

1. **Visa Retail Branch Program**

- Customer facing sweepstakes and in-branch program to drive activation
- Coinciding employee training materials, quizzes, and incentives

2. **Card Carrier**

- A critical, highly read communication piece
- If possible, include letter or insert along with carrier to promote card benefits, activation, and use

3. **Follow-up Authentication Direct Mail & Email**

- 10 days after card carrier mailing, send low cost direct mail with language that encourages cardholders.
- Sample message: *"For your safety, you must activate your card before first use..."*

Activation Plan

Key Activities



4. Welcome Kit
 - Before the end of first month, send a Welcome Kit which encourages activation and usage
 - Consider including the Visa Merchant Offer Program or Visa Extras
 5. Follow-up Activation Direct Mail, Email & Call to inactives
 - After first month, target inactives with direct mail utilizing the Visa Merchant Offer Program
 - Consider calling using customer service positioning such as *“We’ve noticed you have’nt activated your card, we wanted to be sure you received it. For your safety, you must activate your card before first use..”*
 6. Rewards Spend & Get or Forced Billing Statement
 - Before end of the second month, target inactives with an aggressive offer such as a rewards spend & get or a \$10 credit on a forced billing statement with statement insert
 7. Customer Service Letter & Email
 - Finally target any inactives with a low cost customer service letter
 8. Visa Small Business Credit Customer Microsite
 - Create a microsite or pages where all communications can point to, providing more in-depth benefits education on Visa Small Business Card
- Ongoing Tracking and Analysis

As campaigns reach the market, Visa offers measurement tools to help track performance.

 - Compare to benchmarks from Financial Calculator
 - Measure and track programs using Visa Vue and Visa Data Track