



WORKSHEET



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Print this worksheet to use as a guide to planning and designing your incentive program.



01 DEFINE GOALS

of _____ (product)

in _____ (market)

thru _____ (channel)

during _____ (timeframe)

by _____ (\$ or %)

Reminder: Are the goals S.M.A.R.T.?

02 UNDERSTAND TARGET AUDIENCE

Average Age _____

Male/Female _____

Average Pay _____

Job Titles, Level _____

of Participants _____

of Locations _____

03 ANALYZE CURRENT STATE

04 DESIGN PROGRAM STRUCTURE

05 SELECT REWARDS & RECOGNITION



Travel



Merchandise



Gift Cards



Prepaid Cards



Experiential

06 ASSIGN PROGRAM ADMINISTRATION

Reminder: Internal do-it-yourself or hire an incentive agency?



07 ADD TECHNOLOGY PLATFORM

08 CREATE COMMUNICATIONS

- | | | |
|---|---|---|
| <input type="checkbox"/> Theme | <input type="checkbox"/> Kickoff Event | <input type="checkbox"/> Monthly Statements |
| <input type="checkbox"/> Teaser | <input type="checkbox"/> Kickoff Kits | <input type="checkbox"/> Postcards |
| <input type="checkbox"/> Kickoff Announcement | <input type="checkbox"/> Banner or Button Ads | <input type="checkbox"/> Reminders |
| <input type="checkbox"/> Email Announcement | <input type="checkbox"/> Posters | <input type="checkbox"/> Giveaways |

09 BUILD THE BUDGET

Awards	.....	.....	Industry Norms 70-85%
Technology	.....	.....	2-10%
Communications	.....	.....	4-12%
Administration	.....	.....	5-15%
TOTAL	.....	.....



10 TRACK ACHIEVEMENTS

11 FULFILL REWARDS

12 REPORT RESULTS

12.5 KEEP IT FRESH!

For a complimentary 15 minute consultation on your worksheet with Mike, please send your worksheet to info@brightspot.email Include "12.5 Step Worksheet Consultation" as your email subject line.

