

Incentive/Recognition Program Planner

Incentive and recognition programs begin with sorting through the pieces and analyzing the information before making plans. This program planner has been designed to begin the discovery process by gathering information to assist in the development process.

SPONSORING COMPANY PROFILE

Organization Name: _____

Contact Name: _____

Title: _____

Address: _____

City, State, Postal Code: _____

Phone Number: _____

Email Address: _____

Website: _____

Your type of business: Manufacturer ☐ Distributor ☐ Wholesaler ☐ Service ☐ Retailer ☐
Education ☐ Government ☐ Not-for-profit ☐ Other _____

What are your key products or services? _____

PROGRAM PROFILE

Who is your target audience to participate in the program (check all that apply)?

_____ Employees	_____ Independent Contractors
_____ B2B Customers	_____ Consumers
_____ Dealers	_____ Volunteers
_____ Members	_____ Other (please specify): _____

Please list as much detail any other demographics (age, gender, income, location, etc.):

How many people are in the target audience? _____

If the participants are not consumers, how many locations? _____

What are the objectives your organization wants to accomplish (check all that apply)?

- | | |
|-------------------------------------|-------------------------------------|
| _____ Improve morale | _____ Improve performance |
| _____ Increase revenues | _____ Launch new product/service |
| _____ Gain new customers | _____ Improve customer satisfaction |
| _____ Reduce Accidents | _____ Reduce Turnover |
| _____ Increase production | _____ Increase product knowledge |
| _____ Increase market share | _____ Recognize anniversaries |
| _____ Other (please specify): _____ | |

Have you already defined the rules of the program? Yes ☐ No ☐

If yes, what are they? _____

How will you measure if the goals have been achieved? _____

What are the results your organization expects to realize? _____

How often do you want to recognize the participants for goal accomplishments?

Immediately ☐ Weekly ☐ Monthly ☐ Quarterly ☐ End of program ☐ Other _____

Do you have an estimated program launch date? Yes ☐ No ☐

If yes, what is the date? _____

What is the proposed time period of your program?

Ongoing ☐ Start _____ Finish _____

Have you decided on a program theme? Yes ☐ No ☐

If yes, please indicate: _____

What are the ways your target audience can receive program communication (check all that apply)?

- | | |
|-------------------------------------|-------------------|
| _____ Website | _____ Email |
| _____ Direct Mail | _____ Print Media |
| _____ Signage | _____ Displays |
| _____ Other (please specify): _____ | |

PROGRAM BACKGROUND INFORMATION

Is your organization currently running an incentive or recognition program targeting the same planned audience? Yes ☐ No ☐

If no, has your company ever run an incentive or recognition program? Yes ☐ No ☐

What were the dates for the program? _____

If yes, what are or were the main objectives? _____

What type of awards were used? _____

How did your organization select the awards? _____

Were teams recognized? Yes ☐ No ☐

Was the program considered a success? Yes ☐ No ☐

Yes or no, what were some of the reasons? _____

How did your organization measure the results of the program? _____

Was there a part of the program that did especially well? Yes ☐ No ☐

If yes, what were some of the reasons? _____

Was there a part of the program that did not work well? Yes ☐ No ☐

If yes, what were some of the reasons? _____

PROGRAM MANAGEMENT

Do you anticipate the program administration will be managed at :

Central Level ☐ Branch Level ☐ Regional Level ☐ Other _____

Please choose an administration method that is most appealing:

☐ Option 1

Your program administrator or internal computer system will track the sales or purchases and will be responsible to issue point checks to the participants who qualify. (Our point checks are a sequentially numbered, three-part carbonless form that can be typed on, run through a dot matrix printer, or handwritten. The participant will receive two copies of the check and the administrator will keep one for their records.)

☐ Option 2

Your program administrator or internal computer system will track the sales or purchases and will be responsible to forward that data to us. We will issue point statements to the participants who qualify. (Our point statements detail the cumulative program earning of participant such as, total points earned, points redeemed, points remaining, bonus points, etc.)

☐ Option 3

Your program administrator or internal computer system will track the sales or purchases and will be responsible to forward that data to us. We will post the point issuances on a secured Website for your participants to access with a user name and password. (The participants will be able to view points earned, redeem points, and view points spent, etc.)

PROGRAM SUMMARY

What will be the process for making a decision on a supplier? (Please describe) _____

What factors will you be considering for making your decision? _____

When do you plan to make a final decision? _____

Is there a committee involved in reviewing this program? Yes ☐ No ☐

If yes, please describe who the committee is made up of (positions) and the number of members.

How will a final decision be made about this program? _____

When is your next scheduled committee meeting? _____