



Marketing Checklist

This checklist is meant to serve as a helpful guide in promoting Constellation Payments to your customers. Please note that the content provided here should only be used as a starting point. Your content should always be tailored to specific market needs and adjusted to match the services you offer through Constellation Payments, such as terminal integration and credit card processing.

Press Release Creation & Distribution

| | Action Item | Completed |
|---|--|--------------------------|
| 1 | Use the Success Kit Component: 'Press Release Template' as a starting point. | <input type="checkbox"/> |
| 2 | Adjust title and body paragraphs to support your software's specific services and benefits offered through Constellation Payments (e.g. terminal integration, credit card processing, debit card processing). | <input type="checkbox"/> |
| 3 | Include a quote from a representative at your company. | <input type="checkbox"/> |
| 4 | Include a quote from a representative at Constellation Payments. | <input type="checkbox"/> |
| 5 | Add your boilerplate to the press release. (A boilerplate is also referred to as an "About Us" statement) | <input type="checkbox"/> |
| 6 | Distribute your press release. Consider using a press release distribution service like PR Fire , PR Web , Presswire , or 24-7 Press Release to get your press release out quickly, and to minimize manual work. | <input type="checkbox"/> |



Email Marketing Campaign

| | Action Item | Completed |
|---|---|--------------------------|
| 1 | Use Success Kit Component: 'Sample Email Messaging' as a starting point. | <input type="checkbox"/> |
| 2 | Adjust the subject lines and body paragraphs to support your software's specific services and benefits offered through Constellation Payments (e.g. terminal integration, credit card processing, debit card processing). | <input type="checkbox"/> |
| 3 | Determine your call to action (CTA) — the main action you want your customers to take, such as learning more about Constellation Payments and getting a rate quote. If you can add an additional incentive to the 'learn more' CTA, such as a free software module add-on, we encourage you to do so. The stronger the CTA, the better your results. Limited-time offers with an expiration date are also an effective way to create urgency and encourage action from customers. | <input type="checkbox"/> |
| 4 | Plan your email sequence and follow-up. Utilize automated email campaign/drip email functionality. Most email marketing software includes this functionality which allows you to create a set of marketing emails that will be sent out automatically on a schedule. | <input type="checkbox"/> |
| 5 | Send emails through an email marketing provider such as MailChimp , AWeber , or Constant Contact to track and evaluate effectiveness. Some metrics to track through your email marketing provider are: deliverability, open rate, click-through rate, and conversion rate. | <input type="checkbox"/> |


Custom Audience Facebook Ad

| Action Item | | Completed |
|-------------|---|--------------------------|
| 1 | <p>Determine what type of custom audience ad you'll use. Standard Custom Audiences allow you to upload a list of customer emails, phone numbers, or Facebook User IDs that Facebook will match with its users. You can then target your ad to those specific users.</p> <p>Website Custom Audiences allow you to insert a Facebook Pixel tracking code on your website and target your Facebook ad to users that have visited a specific page on your website during a specific period of time.</p> | <input type="checkbox"/> |
| 2 | <p>Create your ad. See example below.</p> | <input type="checkbox"/> |
| 3 | <p>Create your lead capture form. Facebook offers pre-populated forms making it easy for people to submit their contact information in just a few taps. People are more likely to complete these forms since the work of filling out the form is mostly done for them.</p> | <input type="checkbox"/> |
| 4 | <p>Consider running your social media campaign in conjunction with your email marketing campaign. Studies show that email openers are more likely to convert when also seeing a Facebook Ad. If you do run an email marketing campaign and social media campaign concurrently, make sure the message, offer, and design match to maximize impact and response.</p> | <input type="checkbox"/> |


Example Facebook Ad



 **[Company Name]**
Sponsored · 

Did you know [Software Name] has integrated credit and debit processing? That's right. Processing payments can be one of the easiest parts of your day.



Simplify & save money with Constellation Payments. [Get Quote](#)

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 Like  Comment

Blog Posts

| Chargeback Prevention Tips | | Shared |
|----------------------------|--|--------------------------|
| 1 | Best Business Practices: 3 Tips for Effectively Handling Credit Card Chargebacks | <input type="checkbox"/> |
| 2 | 21 Simple Steps to Reduce Your Risk of Chargebacks | <input type="checkbox"/> |
| 3 | How to Prevent In-Person & Online Fraudulent Transactions That Can Result in Chargebacks | <input type="checkbox"/> |
| 4 | 7 Ways to Proactively Prevent Credit Card Chargebacks | <input type="checkbox"/> |

| Data Security Best Practices | | Shared |
|------------------------------|---|--------------------------|
| 1 | Suspect Fraud? How and When to Make a Code 10 Authorization Request | <input type="checkbox"/> |
| 2 | The Equifax Hack: What You Need to Know, Steps to Keep Customer Data Safe | <input type="checkbox"/> |
| 3 | Cybersecurity Operations: Is Your Business Complying with These PCI-DSS Requirements? | <input type="checkbox"/> |
| 4 | Your Cyber Incident Response Exercise | <input type="checkbox"/> |
| 5 | Step Up Employee Cybersecurity Training with These 3 Resources | <input type="checkbox"/> |

| Payment Terminal Education & Best Practices | | Shared |
|---|---|--------------------------|
| 1 | 4 Facts that Prove Software-Integrated Terminals are Better for Business | <input type="checkbox"/> |
| 2 | Help! Do I Really Need to Upgrade to an EMV Chip Card Terminal? | <input type="checkbox"/> |
| 3 | Help! Card Not Present Fraud is on the Rise: What Can I Do to Prevent It? | <input type="checkbox"/> |
| 4 | What Is Card Present Fraud? How Can It Be Prevented? | <input type="checkbox"/> |
| 5 | Help! I Process Very Few Credit Card Transactions Each Month. Do I Need to Worry About EMV? | <input type="checkbox"/> |
| 6 | Clear Up “EMV Chip Card Confusion” with These 4 Resources | <input type="checkbox"/> |
| 7 | Help! Which EMV Payment Terminal Should I Use in My Business? | <input type="checkbox"/> |
| 8 | Top 5 Myths About EMV Every Merchant Should Know | <input type="checkbox"/> |

| PCI Compliance Education & Best Practices | | Shared |
|---|--|--------------------------|
| 1 | PCI Data Security: The #1 Misconception That Can Harm Your Business and Its Reputation | <input type="checkbox"/> |
| 2 | What Every Business Needs to Know About PCI (10 FAQs Answered) | <input type="checkbox"/> |
| 3 | Quick Guide to PCI Compliance: What You Need to Know, Steps to Take | <input type="checkbox"/> |

Blog Posts, Continued

| Payment Education & Services | | Shared |
|------------------------------|---|--------------------------|
| 1 | What's the Visa/MasterCard Purchase Return Authorization Requirement? | <input type="checkbox"/> |
| 2 | Help! What Do I Do with Transaction Declines and Blacklisted Transactions? | <input type="checkbox"/> |
| 3 | Mid-Year Financial Checkup: 5 Steps Every Business Owner Should Take | <input type="checkbox"/> |
| 4 | Need Your Money Quicker? Standard ACH & Same Day Funding Explained | <input type="checkbox"/> |
| 5 | Manage Incoming Payments Like a Pro: 3 Tools to Start Using Today | <input type="checkbox"/> |
| 6 | Form 1099-K: What Business Owners Need to Know | <input type="checkbox"/> |
| 7 | What's an ACH Payment? How Does ACH Benefit My Business? | <input type="checkbox"/> |
| 8 | How to Read a Monthly Credit Card Processing Statement | <input type="checkbox"/> |
| 9 | 3 Ways to Save Money When Processing Payments | <input type="checkbox"/> |
| 10 | Convenience Fees & Surcharges: What's the Difference? What's Permitted? | <input type="checkbox"/> |
| 11 | Understanding Credit Card Processing Charges: A Look at Interchange, Tiered and Flat Rate Pricing | <input type="checkbox"/> |
| 12 | Glossary of Payment Processing Terms | <input type="checkbox"/> |
| 13 | Help! What's a Payment Gateway? When Do I Need a Payment Gateway? | <input type="checkbox"/> |
| 14 | Help! Should I Get a Hosted Payment Page for My Business? | <input type="checkbox"/> |
| 15 | Credit Card Tokenization: Data Thieves Can't Steal What Isn't Theirs | <input type="checkbox"/> |