

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.	
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).	
3	Include a quote from a representative at your company.	
4	Include a quote from a representative at Constellation Payments.	
5	Add your boilerplate to the press release. (A boilerplate is also referred to as an "About Us" statement)	
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.	

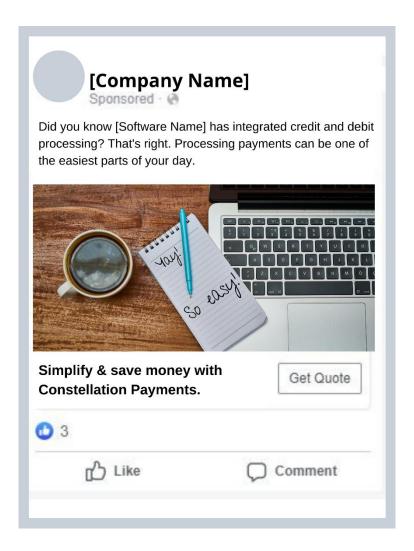
Email Marketing Campaign

	Action Item	Completed
1	Use Success Kit Component: 'Sample Email Messaging' as a starting point.	
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).	
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.	
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.	
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.	

Custom Audience Facebook Ad

	Action Item	Completed
1	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. 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.	
2	Create your ad. See example below.	
3	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.	
4	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.	

Example Facebook Ad



Blog Posts

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

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



Blog Posts, Continued

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

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



Blog Posts, Continued

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

