

Launching a Program Incentive Campaign

Achieve Incentive Campaign - FAQs

What are Achieve program incentives and why are they important?

Incentives can be a great way to launch your program, increase usage, and engage the entire company around the importance of the program and its long-term impact.

Who are you trying to reach with this incentive?

The goals and prizes for your incentive will vary depending on an internal or external campaign. First, determine the audience and then consider what financial topics are most relevant to them.

What is your main goal of launching an incentive?

Determining your goal(s) will help guide the overall incentive strategy. If your goal is to direct users to your products and services, consider offering this as the prize. For example, if you are already promoting new checking accounts, this may be a good opportunity to use this as an incentive to open an account. Trying to increase employee engagement? Post about the incentive opportunity on your intranet and tie the prize to a company celebration (pizza party, points program, etc).

How long are you planning on running this incentive campaign?

The length of the incentive campaign can range. If you have an upcoming workshop or event, try offering a prize for playlist completion during that day/week. For an internal employee incentive, a 2-4 week period is our recommendation. You also have the option of running a month or quarter-long incentive, but we suggest offering a larger prize to continue engagement and excitement.

What playlists appeal to your employees/consumers?

You can choose to offer an incentive for one playlist, a few, or all playlists that you sponsor. Start by considering relevant topics for the month or any upcoming holidays/company events. For example, back to school season (July - September) is a great time to promote the "Investing in Your Future" playlist.

What prizes are most appealing for an incentive campaign?

When in doubt, gift cards and cash are great options! To customize the prize, consider the playlist(s) you're promoting and align the incentive to the topic. For instance, when promoting the completion of the Homebuying playlist, a gift card to Home Depot might be a fun option!

What do I have to do to launch this campaign? What will EVERFI do?

To get started, simply complete the short checklist on page 3, providing EVERFI with your goals, and draft language. EVERFI will then set up the incentive campaign for you and initiate the tracking. From there, you're ready to run the outreach and promote the campaign.

Achieve Incentive Campaign - Prize Suggestions

These are simply examples, so feel free to offer a prize that is more specific to your financial institution. Prize suggestions are organized by playlist.

Financial Foundations

- Audience: Recent high school or college graduates, ages 18-25
- Prize ideas: \$100 gift card to a grocery store, \$500 Amazon gift card, \$200 deposit into a savings account

Preparing for Retirement

- Audience: Experienced professionals, ages 45-55
- Prize ideas: \$1,000 deposited into a savings account, free consultation with a financial planner

Building Financial Capability

- Audience: Everyone
- Prize ideas: Free consultation with tax accountant, \$500 deposit into a savings account

Investing in Your Future

- Audience: Young parents or single individuals interested in changing careers, ages 35-50
- Prize ideas: \$1,000 [529 Savings Gift Card](#), \$100 Visa gift card

Owning a Home

- Audience: First-time home buyers, ages 25-35
- Prize ideas: \$500 gift card to a home improvement store, \$500 in credit towards the closing costs of a mortgage

Small Business Essentials

- Audience: New entrepreneurs, ages 25-40
- Prize ideas: Free consultation with a small business lender, \$500 gift card at printing/office supply shop

Financial Caregiving

- Audience: Adults who have taken on the financial responsibilities of a loved one, ages 50-65
- Prize ideas: Free consultation with a financial planner, \$100-500 meal delivery voucher

Achieve Incentive Campaign - Getting Started Checklist

Please complete the sections below and share them with your EVERFI Account Manager. It is typically a two-week turnaround once the Account Manager receives the content.

| | |
|---|--|
| <p>Title/Audience: (Q4 Member Incentive)</p> | |
| <p>Playlist Title:</p> | |
| <p>Campaign Start & End Dates:</p> | |
| <p>Incentive Message - max 100 characters: (e.g. Complete this playlist to be eligible for a chance to win a \$100 Visa gift card.)</p> | |
| <p>(Optional) Incentive Details CTA - max 20 characters: (e.g. Terms and Conditions*) *Connect with your Legal team when drafting official terms and conditions.</p> | |
| <p>Completion Message - max 100 characters: (e.g. Congrats on completing this playlist, you will now be entered for a chance to win a \$100 Visa gift card!)</p> | |
| <p>(Optional) Completion Details CTA - max 20 characters: (e.g. Take the survey, Terms & Conditions, etc.)</p> | |

Achieve Incentive Campaign - User Experience

The yellow circles below outline where your incentive campaign will be promoted on your site.

LANDING PAGE

Select a Playlist

Financial Foundations 

Understand the basics of some key financial concepts.

[Explore](#)

Preparing for Retirement 

Learn how you should prepare for an eventual retirement.

[Explore](#)

 **Incentive Offered**

Building Financial Capability 

Learn how to manage your money and avoid financial dangers.

[Explore](#)

Investing In Your Future 

Learn how to be more financially prepared in the years ahead.

[Explore](#)

 **Incentive Offered**

Building Financial Capability 

Learn how to manage your money and avoid financial dangers.

[Explore](#)

INCENTIVE MESSAGE & CTA

EVERFI Login

Building Financial Capability

Complete this playlist and be entered for a chance to win a \$50 gift card!

[Terms And Conditions](#)

IN PROGRESS (9) COMPLETED (0)

| | | | |
|--|--|-------|----------------------------|
| | <p>Identity Protection</p> <p>Learn how to protect your identity and personal information.</p> | 5 min | Start > |
| | <p>Creating a Budget</p> <p>Learn strategies, tips, and tools to stick to your budget and achieve your financial goals.</p> | 5 min | Start > |
| | <p>Credit Scores and Reports</p> <p>Why establishing and maintaining strong credit matters so much for your financial health.</p> | 5 min | Start > |

Complete this playlist and be entered for a chance to win a \$50 gift card!

[Terms And Conditions](#)

COMPLETION MESSAGE & CTA

EVERFI Login

Building Financial Capability

Congratulations! You've completed the playlist and have been entered to win a \$50 gift card!

[Terms And Conditions](#)

IN PROGRESS (9) COMPLETED (9)

Hooray you finished all the modules in this playlist! Try a new playlist in Discover Additional Playlists below.

Congratulations! You've completed the playlist and have been entered to win a \$50 gift card!

[Terms And Conditions](#)

BEST PRACTICE RECOMMENDATION

A user must register or login in order to save their progress and appear within the Admin Reporting Center as eligible for the incentive. EVERFI recommends customizing the copy within your registration box to encourage login, there is no character limit. Sample below:

×

Log In

Please login to save your progress and to be eligible for incentives.

Continue with Google

Continue with Facebook

or

Continue with Email or Username

Don't have an account? [Register](#)