

LUCKY SAVERS

Appendix 1: Implementation Checklist

- Legal review of Participation Agreement and Exhibits A and B
 - Participation Agreement signed and returned to NYCUA Exhibit B (Official Rules) customized and final PDF returned to NYCUA
 - Exhibit A (Implementation Guide) reviewed
- Appendices 1-9 reviewed (available on the administrative website)
 - Appendix 1 – Implementation Checklist
 - Appendix 2 – Credit Union Information Sheet
 - Appendix 3 – Data Requirements and Sample File
 - Appendix 4 – Truth in Savings Disclosure Template
 - Appendix 5 – Marketing Plan
 - Appendix 6 – Process for Contacting Winners
 - Appendix 7 – Winner Eligibility Checklist
 - Appendix 8 – Winner Media Release
 - Appendix 9 – COMMONWEALTH Research Survey
- Create product team
 - Credit union administrative website access – Fill out Appendix 2: Credit Union Information Sheet and return to TruLync Product Manager
 - E-mail credit union logo to NYCUA Product Manager
- TIS Disclosure prepared for your members
- Marketing efforts planned
 - Review Appendix 5: Marketing Plan
 - Plan 12-month marketing strategy
 - Order marketing materials
 - Add Lucky Savers banner ad and logo on credit union website
- Data file preparation
 - Review Appendix 3: Data Requirements and Sample File
 - Set up 12 month share certificate in data processor
 - Prepare test file and upload between the 15th and last day of any month (no testing between 1st and 14th of month to avoid confusion between live and test data)
 - Monthly data files are due by 3rd business day of each month
- Training session set up and completed with all employees
 - Trainer's Guide
 - Product reference, prize distribution and FAQ sheets posted to staff intranet
 - Product Training PowerPoint (customize for your credit union)
- Media/Public Relations efforts planned
 - Customizable Winner Press Release sent to local media
 - Talking Points reviewed and accessible in case of media inquiries