

Gift & Loyalty *Merchant Questionnaire*



Gift Card Consultant: _____ Date: _____

Business Name: _____ Contact: _____

Address: _____ State: _____ Zip: _____

Phone: _____ Website: _____ Email: _____

To better assist you we would like you to answer the following questions:

Do you sell Gift Certificates now? **YES NO** How many do you order per year? _____

Do you sell fixed denominations? **YES NO** If so what amounts? _____

Do you give cash back? **YES NO** If so what are the average amounts refunded? _____

Do you issue store credits on returns? **YES NO** Average Gift Certificate sale? _____

Do you offer any special promotions with Gift Certificates now? **YES NO**

If so what do you offer? _____

Do managers give comps to customers for meals/goods/services each month? **YES NO**

What type of POS, terminal or software do you use? _____

What version do you have? _____ Where is your POS dealer located? _____

Do you have or quarterly or annual budget for marketing? **YES NO** If so how much? _____

Do you see value in having a frequent dinner, points or loyalty program? **YES NO**

If you could increase sales by 30%-80% or more would you spend 3% of that upfront? **YES NO**

Would you market your program with POS signs, up selling, printed material? **YES NO**

Would you like to have an online balance checker for your Gift Cards? **YES NO**

Would you like to offer local businesses around you special offers to frequent your business? **YES NO**

Rank by importance of these Points of Interest (1=most important)

_____ 20-30% increase in Gift sales when switching from paper to plastic

_____ Breakage (unredeemed cards) 10-15%

_____ 3 month average float (outstanding value of cards)

_____ NO cash back (not giving any cash back), 100% value

_____ Employee incentives and up selling to increase sales

_____ Increased tracking and reporting and saving bookkeeping time

_____ Brand awareness (your card logo)

_____ Saving time at the POS, speeding up the process

Thank you for taking the time to answer these questions. This worksheet will better help us to define your needs and create a Gift or Loyalty program that will increase sales and streamline operations.