



Financial Institution / Walmart Meeting Checklist

Financial Institution (FI):				
FI Person:		Phone #:	Email:	
Store #/Address:				
Store Contact:		Phone #:	Email:	
FSI Representative:				
Advertising	Topic Approved (Yes or No)	Revisit Topic on Follow Up	Decision made by Corporate or Store Manager?	Contact Person to follow up with
No Advertising Done Without Walmart Approval!				
*With approval the following may be permitted				
<i>Press Release: Email Don Dixon (see right for address) 3-4 weeks prior to print date</i>			Wal-Mart Corporate	Don Dixon - FSI's Walmart representative ddixon@supermarketbank.com
<i>Internal Marketing: Email Don Dixon (see right for address) 3-4 weeks prior to print date; using Walmart name as a location is permitted (i.e.: Direct mail, Statement stuffers, letters to customers/members).</i>				
<i>Media Advertising: Radio, billboard, newspaper, TV, social media (Must email Don Dixon - info to right).</i>				
In-Store Promotional Opportunities (Inside store)	Topic Approved (Yes or No)	Revisit Topic on Follow Up	Decision made by Corporate or Store Manager?	Contact Person to follow up with
Get to know the Financial Institution Day (Recommended prior to the store's 1st day of business)			Store Manager	
<i>Attend Store meetings to educate associates and management about FI products and services.</i>				
<i>Exchange phone numbers between FI and Walmart Management in case of emergency.</i>				
<i>Request to display FI information in the breakroom. (If the Walmart manager agrees, he/she would have to be given the information and would have to place it in the breakroom)</i>				
Provide flyers about a special account for associates to HR				
In-Store Business Development <i>Use of the store to meet and greet customers (not to sell)</i>				
Permission to set up display table for promotions at branch				
Attend Walmart morning/afternoon cheers				
Joint Seasonal Promotions with co-sponsored gifts <i>Example: "Valentine's Day"</i> <i>FI promotes the sale of flowers/purchase bouquet of flowers from Walmart.</i>				
Where is designated parking area for FI associates?				
Provide the FI phone number and hours to customer service and phone operator				
Customer Service	Topic Approved (Yes or No)	Revisit Topic on Follow Up	Decision made by Corporate or Store Manager?	Contact Person to follow up with
Permission for FI staff/Walmart associates to stuff bags with flyers <i>Show example of flyer.</i>			Store Manager	
Permission for FI staff to bag groceries <i>Emphasize desire to assist cashiers in busy times.</i>				
Participate in store activities <i>Included are holiday events, cheers, family fun days, charitable functions and marketing promotions.</i>				
Additional Information				
Walmart strictly enforces a non gratuity policy.				
Per contract, the in-store branch must be open at 7:30 AM opening day immediately following Walmart's Grand Opening.				
Proof of purchase must be available and on file for all store items brought into or used at the branch. Offense of the policy will be considered shop-lifting. Employee personal purchases, with receipts, should be held by the branch manager if they are brought into the branch. <u>The branch may not "borrow" items from the store without written permission from store management.</u>				