



Thank you for your interest in NFIB's Affinity Provider Program. The Affinity Provider Program (the "Program") has offered unique and valuable channels for companies to reach their desired markets since 1983. As the nation's leading small business advocate, NFIB's brand is well known and represents quality and value to small businesses.

The Program is managed by NFIB Member Services Corporation (MSC), a wholly owned subsidiary of NFIB. Through the Program, NFIB members may be able to access savings and discounts on products and services that are necessary to help their businesses succeed. The buying power of NFIB members combined with the volume of business conducted through the Program delivers a win-win relationship between members and companies who are chosen as an Affinity Provider ("Provider").

MSC is highly selective in determining appropriate companies to evaluate for the Program. Each year, hundreds of inquiries are received from companies interested in providing a product or service that may benefit our members. Only after conducting a thorough evaluation of potential companies will consideration be given for inclusion in the Program.

It is our hope that the information provided herein will educate interested parties on the parameters and requirements that must be met for further consideration, as well as the many benefits that parties receive in return. Please review the information in this document carefully as you consider your company's qualifications for potential inclusion in our program. If you believe there is a match, **please respond in writing to the questions located on the last page of this document. Traditionally, only one new product or service is added per year; however, there are no plans to add products or services in 2021 at this time.**

## The NFIB Affinity Provider Program:

Allows companies to provide products and services to NFIB members utilizing the NFIB brand.

### Criteria for Consideration

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A national offering

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A deep understanding of small business

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An existing customer base of small business

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A willingness to invest in marketing beyond marketing channels offered through NFIB

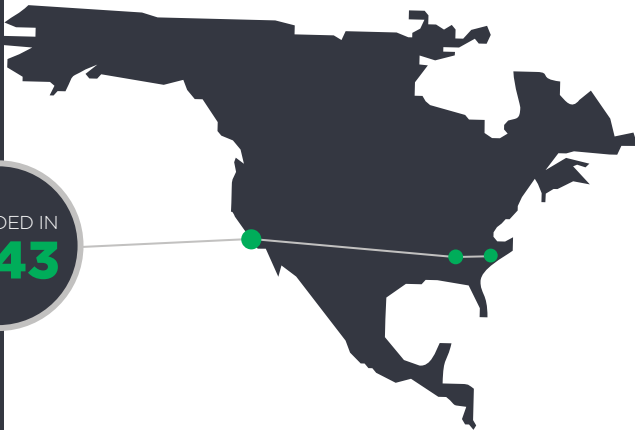
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A minimum annual revenue guarantee paid to MSC, not dependent upon sales/volume

## Organizational Background

Founded in 1943 as a nonprofit, non-partisan business organization, NFIB was created to give small and independent business a voice in shaping the public-policy issues that affect their businesses. Today, NFIB has an ear to the ground on what's happening in Washington, D.C., and in all 50 state capitals, bringing the small business perspective to Congress, state capitals, the courts, and the media.

FOUNDED IN  
**1943**

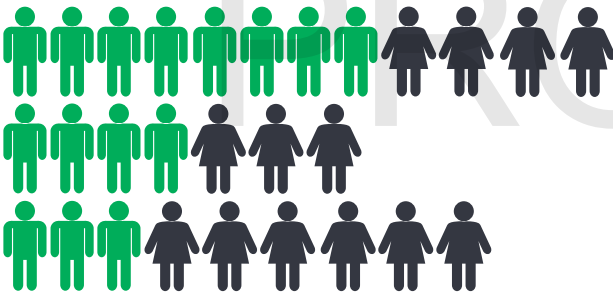


### NFIB MEMBERSHIP DUES

**\$15,000**

To prevent undue influence by one member or group of members, annual dues are capped at \$15,000.

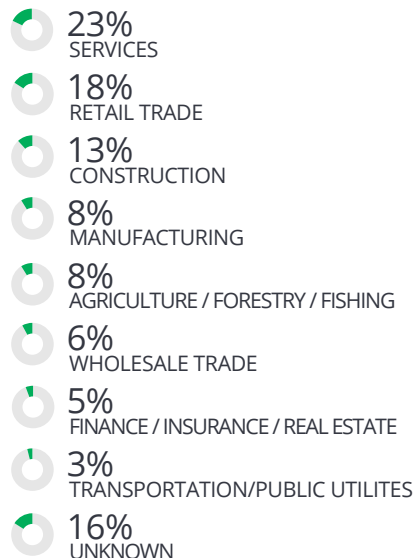
**A  
B  
C**



### NFIB MEMBERS DETERMINE NFIB POLICY

Through our unique balloting process, each member gets one vote and the majority vote determines NFIB's official position. Once the ballots are tallied, NFIB's lobbyists carry the message to Congress and the state legislatures, backed by the clout of a powerful network of hundreds of thousands of small business owners.

### MEMBERS BY INDUSTRY



### WANT MORE INFORMATION

Additional membership statistics and demographics can be provided based on a mutual determination of interest and the execution of a Non-Disclosure Agreement.



Source: Q4 2020 NFIB Membership Statistics

## A. PROGRAM INCEPTION

In 1983, MSC was founded with the belief that the collective strength of the NFIB membership could result in the acquisition of significant member discounts on products and services small business owners use to succeed in business. This resulted in the NFIB Affinity Provider Program.

Managed by the MSC Team, Providers receive a substantial amount of support and assistance with marketing to NFIB members. The Team is knowledgeable in areas including NFIB membership, best practices, prior results, market research, and also serves as the liaison to advocate and assist in communicating the Providers' key messages through available marketing channels.

Additionally, the MSC Team provides best-in-class support to Providers with focus on the following areas:

- Proven launch planning and implementation
- Marketing and campaign management and reporting
- Performance and financial reporting, forecasting, and analysis
- Membership list management, targeting, and segmentation



We have worked with NFIB's MSC Team for ten years. They exemplify everything it means to be an exceptional partner. They take the good and the bad in stride, handling every situation with complete professionalism.



**Mr. Jason Larson**

Vice President, Savings4Members | Affinity Provider since 2011

## B. PROGRAM PARAMETERS

MSC only considers products/services and companies that have all of the following attributes:

- Provides a solution to a member need – There is a clear and proven need for this product or service among a significant number of NFIB members
- Has experience with small businesses – The product or service is available to a significant number of small businesses
- Provides a benefit – The product or service helps small businesses succeed, or delivers exceptional value to NFIB members and/or their employees or customers
- Provides a unique offer – The product or service must be offered to NFIB members with terms more attractive than what can be found in the general marketplace
- Has national availability – The company is able to sell and service its products in all 50 states and the District of Columbia
- Has affinity relationship experience – The company must understand and be able to demonstrate an ability to manage affinity relationships and customize its operations to meet the requirements of the Program



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For over 20 years, Heartland Payment Systems and its affiliated companies have been dedicated to providing NFIB members the best payment and business solutions for small businesses. Likewise, the talented MSC team at NFIB is singularly focused on providing the “best of class” experience for its providers, vendors and most importantly, its members. There is no one who understands the SMB market space like NFIB.

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**Ms. Kathleen Ervin**

Director, Relationship Management Commercial Services, Heartland Payment Systems

## MARKETING SUPPORT

MSC has a multi-channel marketing strategy that features and promotes the entire collection of Providers' products and services via NFIB.com, direct mail and email. As campaigns are developed, NFIB marketing channels may also be utilized to promote a Provider via: electronic and digital assets, social media (Facebook, Twitter, etc.), and paid advertising.

The MSC Team will assist Providers in leveraging all communication channels that are used to communicate with NFIB members.

## NFIB BRAND

The NFIB brand and its logo are symbols of quality, trust, value and reliability. A valuable aspect of becoming a Provider is being included in the collection of resources within the brand. Communications from Providers are typically co-branded; leading with the NFIB brand as member recognition of this logo/brand results in higher response.

## NFIB MEMBER LIST

Potential access to the NFIB membership list for direct mail and telemarketing purposes may be granted to Providers. The list can be segmented by various criteria such as years in business, revenue, and number of employees.

# NFIB Member Snapshot

NFIB membership is open to all independent businesses, excluding not-for-profit and publicly held companies. NFIB's approximately 300,000 members span the spectrum of business operations, ranging from one-person cottage enterprises to firms with hundreds of employees.

Source: Q4 2020 NFIB Membership Statistics



57%

of NFIB members have been in business 20 years or longer

AVERAGE MEMBER TENURE



## Regional Locations

WEST

CENTRAL

NORTH

SOUTH

19%

26%

29%

26%

## A. UPHOLDING BEST-IN-CLASS REPUTATION

Program positioning is centered on providing access to high quality products and services that are not readily accessible or available in the general marketplace. MSC will only consider products/services from companies that can demonstrate a proven value to small businesses. As a result of our organization's strong affinity with our members, rigorous financial and operational due diligence is conducted on all companies prior to inclusion in the Program.

## B. FINANCIAL REQUIREMENTS

Because MSC invests in marketing and strategic support of each Provider's product/service, the Program should provide recurring revenue. This typically includes payment on the acquisition of new customers, and a percentage of sales, transaction volume, loan volume, etc.

## C. MARKETING REQUIREMENTS

In addition to marketing conducted by MSC, Providers are also expected to market their services directly to members (one of the many benefits of being a Provider is potential access to the NFIB member list). These expectations, along with reporting requirements, are clarified below:

- Marketing plans: While there is no minimum marketing investment required, it is expected that Providers will take advantage of NFIB's available marketing channels. The most successful Providers utilize an integrated marketing plan to maximize their exposure to NFIB members.
- Relationship Manager: We request that each Provider identify an experienced Relationship Manager to serve as a primary liaison for the MSC Team. The Relationship Manager will oversee the implementation of the marketing plans, handle day-to-day contact with the MSC Team, and assist with troubleshooting any operational issues.
- Marketing resources: Providers will need to assist with developing advertising and content for inclusion in NFIB marketing channels by providing resources (i.e., logos, brand standards, copy points, etc). MSC will rely on these marketing resources to assist in identifying new opportunities for the promotion of products/services within the NFIB channels as well as aid in the development of the marketing material and content.

## D. REPORTING REQUIREMENTS

MSC desires to gain a deep understanding of NFIB members' behavior in the program through standardized reporting. Tracking and reporting are crucial to interpreting the success of our marketing strategies. Therefore, at a minimum, each Provider is required to submit quarterly performance and revenue reports which detail key performance metrics.

## E. LEGAL REQUIREMENTS

If chosen as a Provider, each company will be required to enter into formal agreements.

1. Program Agreement – This agreement is between MSC and the Provider and includes the primary business and legal terms of the relationship.

2. Royalty Agreement – This is an agreement between NFIB and the Provider that allows the Provider to use the NFIB logo, service marks, and potential access to the membership list owned by NFIB.

It is important to note that NFIB/MSC has several legal requirements with regard to these agreements that are non-negotiable. These are:

1. Use of NFIB/MSC form agreements
2. A minimum three-year contract term
3. Tennessee law and venue



MSC follows an intensive multi-step process to ensure that the highest quality and viable offer is presented to our members. Should the decision be made to move forward with evaluating the product/service category that your company provides, you may be contacted in approximately 90-120 days for further discussion.

## THE FULL PROCESS INCLUDES:

- 1 MSC receives required information from interested company
- 2 MSC evaluates member need(s) through surveys, requests, and market research
- 3 MSC identifies additional companies that offer similar products/services and have experience with the small business market
- 4 MSC invites identified companies to participate in a Request for Proposal (RFP) process. This process will provide additional data relevant to the opportunity and allow both the companies and MSC to fully evaluate the opportunity
- 5 MSC selects finalist(s) based on criteria stated in the RFP
- 6 MSC and Provider(s) negotiate/execute Affinity Provider agreements
- 7 Program launches to NFIB members

If you believe that there is a match between NFIB's Affinity Provider Program benefits/requirements and your company's sales and marketing goals, you are invited to submit additional information to express your interest in becoming a Provider.

Prospective companies who have not been directly contacted by MSC to submit a RFP are required to submit information to the MSC Team for consideration.

**Please note that at this time, there are no plans to add products and services to the Affinity Provider Program in 2021. You are still welcome to submit your information for consideration.**

[click here to](#)  
**SUBMIT YOUR INFORMATION**