WORKING TEMPLATE / 01

Campaign and buying-unit brief

Define the funded decision and who can approve it.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Buying entity, brand and category

Country and retailer / channel

Sponsor and budget approval

Campaign objective and measure

Mechanic and shopper action

Products, stores and eligibility

Dates, limits and exclusions

Data and approval dependencies

Scope and funding owners

Next decision, owner and date

Use alongside the field guide and workbook.

WORKING TEMPLATE / 02

Coupon acceptance and clearing map

Join issuing, acceptance, validation and reimbursement.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Coupon format and issue route

Unique coupon and campaign IDs

Eligible products and retail scope

Validity and combination rules

Checkout and acceptance evidence

Submission and validation rules

Duplicate, rejection and dispute process

Face value and provider fee basis

Payee, funding and settlement dates

Reconciliation and closeout owner

Use alongside the field guide and workbook.

WORKING TEMPLATE / 03

Cashback claim journey

Scope purchase evidence and a completed payout.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Purchase and claim date windows

Eligible products and retailers

Receipt fields and quality rules

Per-person and total claim limits

Validation and duplicate rules

Approval and appeal route

Payout method and failed payments

Funding and top-up rules

Participant notice and retention

Support and closeout owner

Use alongside the field guide and workbook.

WORKING TEMPLATE / 04

Reward sourcing and fulfilment

Confirm the promise can be delivered.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Reward type and available stock

Supplier, lead time and market

Eligibility and allocation rule

Substitution and expiry terms

Storage / code security

Delivery zones and attempts

Fulfilment evidence

Unclaimed and returned rewards

Client funds and provider fees

Acceptance and closeout

Use alongside the field guide and workbook.

WORKING TEMPLATE / 05

Game mechanic and event dictionary

Separate engagement, proof and sales events.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Commercial objective

Skill, chance or guaranteed reward

Entry route and account rules

Purchase proof if required

Unique participant and event IDs

Reward issue and redeem events

Languages, devices and accessibility

Peak load and support plan

Rules, data and approval owners

Pilot acceptance and next decision

Use alongside the field guide and workbook.

WORKING TEMPLATE / 06

Retailer event and field handoff

Join the retail plan to execution.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Retailer buying entity and sponsor

Brand / category participants

Approved stores and dates

Eligible products and stock

Point-of-sale assets and field tasks

Shopper and checkout journey

Reporting feed and store checks

Exceptions and escalation

Funding and shared responsibilities

Pilot and rollout decision

Use alongside the field guide and workbook.

WORKING TEMPLATE / 07

Measurement and incrementality brief

Agree what the evidence can support.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Primary outcome and business unit

Treatment stores / SKUs / periods

Control selection and pre-trends

Stock, pricing and other promotions

Sales feed and matching quality

Claim / reward / settlement definitions

Contribution and campaign cost basis

Missing data and interpretation limits

Reporting owner and review dates

Acceptance and final decision

Use alongside the field guide and workbook.

WORKING TEMPLATE / 08

Funding and settlement schedule

Define obligations and the cash required.

Write evidence and unknowns separately. Confirm the next owner and decision date.

Client reward funds and ownership

Expected and maximum obligations

Provider fees and direct delivery cost

Funding receipt dates

Retailer / shopper payout dates

Reward sourcing and fulfilment payments

Separate restricted balances

Disputes, top-ups and pause rules

Unclaimed-fund and surplus treatment

Reconciliation and sign-off

Use alongside the field guide and workbook.