



# Member Services Corporation

Dear Interested Provider,

Thank you for your interest in NFIB's Affinity Provider Program. The Affinity Provider Program has offered unique and valuable channels for Affinity Providers 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.

NFIB's Affinity Provider Program is managed by the Member Services Corporation (MSC), a wholly owned subsidiary of NFIB. Our organization is highly selective in determining appropriate companies to evaluate for the Affinity Provider Program. It is our hope that the information provided herein will educate interested parties on the parameters and requirements to be considered for the program, as well as to the many benefits a company receives in return.

MSC receives hundreds of inquiries each year from companies who feel they have a product or service that can benefit our members. Only after conducting a thorough evaluation of potential companies will a company be considered for the Affinity Provider program. Traditionally, only one new product or service is added to the program per year.

Please review the information in this document and consider your company's qualifications for inclusion in our program carefully. If you believe there is a match, please respond in writing to the questions in Section 4 of this document.

Sincerely,

NFIB Member Services Corporation

## The 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 and a customer base of small businesses

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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

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## 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. NFIB's work in Washington, D.C. and all 50 states to ensure small business owners have a strong voice in the development of legislation and regulatory policy that impacts their businesses. NFIB's positions advance consensus of the small business community rather than the narrow interests of any particular trade group.

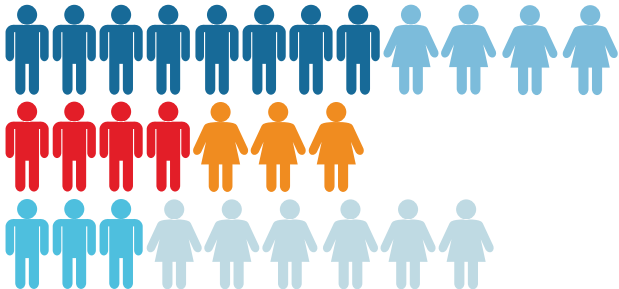
FOUNDED IN  
**1943**



NFIB Membership Dues  
**\$10,000**

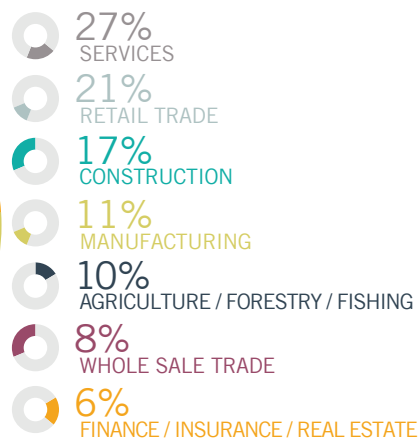
To prevent undue influence by one member or group of members, dues are capped at \$10,000.

**A**  
**B**  
**C**



**NFIB members determine NFIB policy by voting on public policy positions through a unique ballot 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.



## 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.

## A. NFIB MEMBER SERVICES CORPORATION (MSC)

In 1983, MSC was founded with the belief that the commercial strength of the NFIB membership could result in the acquisition of significant member discounts on products and services small business owners use to own, operate and grow their business, which resulted in the Affinity Provider Program.

The buying power of NFIB members combined with the volume of business conducted through the Affinity Provider Program delivers a win-win relationship between members and the Affinity Providers.

## B. THE MSC TEAM

The MSC team provides substantial support in promoting the Affinity Provider Program and plays a hands-on role in assisting Affinity Providers with marketing to NFIB members. The team is knowledgeable in areas including NFIB membership, best practices, prior results, surveys and research information. The team also acts as the liaison with NFIB to advocate and assist in communicating the Affinity Provider's key messages through every available marketing channel.

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

- Proven launch planning and implementation
- Annual and ad hoc marketing and campaign management
- Performance and financial reporting, forecasting and analysis
- Membership list management, data pulls and segmentation
- Response tracking of marketing communications and standardized reporting of campaign results



We have worked with NFIB's MSC team for over three 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.



## C. THE AFFINITY PARTNER PROGRAM

The Affinity Provider Program allows companies to provide products and services to NFIB members utilizing the NFIB brand. Members look to NFIB to provide access to top quality products and services designed for small businesses. Today over 116,000 NFIB members have utilized one or more products in the MSC Affinity Provider Program. [View the current list of products and services.](#)

Mr. Barth Getto | President, BizUnite  
Affinity Provider since 2011

## D. THE PARAMETERS OF THE PROGRAM

MSC typically will not consider a product/service that competes with a product/service already in the program. Additionally and most importantly, we only consider products/services and companies that have all of the following attributes:

- Provide a Solution to a Member Need – There is a clear and proven member need for this product and service among a significant number of NFIB members
- Are Experienced with Small Businesses – The company currently provides its products and services to a significant number of small businesses
- Provide a Member Benefit – The company either helps small businesses own, operate or grow, or the company delivers exceptional personal value to the NFIB member and/or their employees or customers
- Provide a Unique Member 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
- Has Affinity Relationship Experience – The company must understand and be able to demonstrate its ability to manage affinity relationships and to customize their operations to meet the requirements of NFIB's affinity channel.

# BENEFITS OF BECOMING A PARTNER



“ We have grown the number of program offerings and have seen participation skyrocket. We wish that every one of our partners conducted business the NFIB way! ”

Mr. Barth Getto | President, BizUnit  
Affinity Provider since 2011

## MARKETING SUPPORT

MSC has a multi-channel marketing strategy that features and promotes the entire collection of Affinity Provider's 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: electronic and digital assets, social media (Facebook, Twitter), paid advertising and state sponsorships/events.

The MSC staff will assist Affinity Provider companies in leveraging all communications to NFIB members.

## NFIB BRAND

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

## NFIB MEMBER LIST

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, number of employees, etc.

# NFIB MEMBER SNAPSHOT

NFIB membership is open to all independent business, excluding not-for-profit and publicly held companies. NFIB's 350,000 members span the spectrum of business operations, ranging from one-person cottage enterprises to firms with hundreds of employees.



AVERAGE # OF EMPLOYEES

90%

OF NFIB MEMBERS ARE THE OWNERS OR PARTNERS OF THEIR BUSINESS

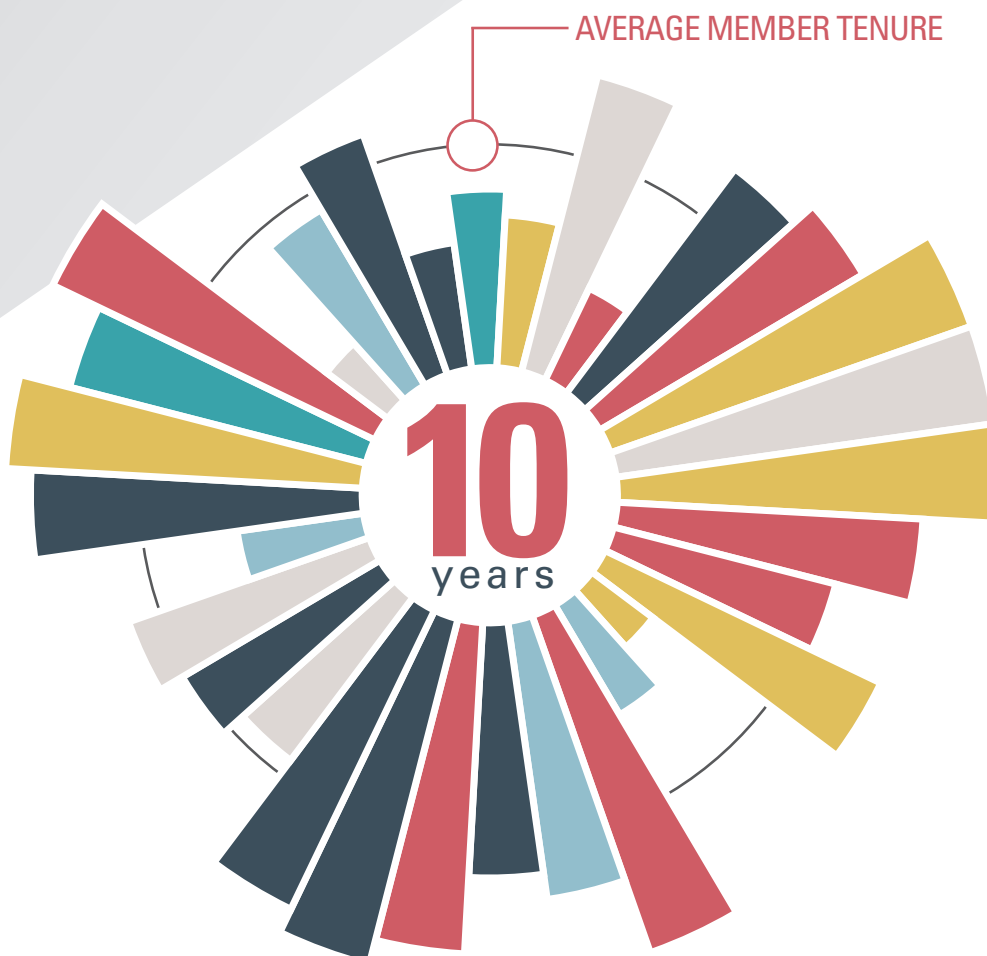
80%

70%

60%

50%

40%



AVERAGE TOTAL REVENUE

**\$1.8 MILLION**

## A. UPHOLDING BEST-IN-CLASS REPUTATION

NFIB's Affinity Provider 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 Affinity Providers that provide a proven value to small business. As a result of our organization's strong affinity with members, rigorous financial and operational due diligence is conducted on all potential Affinity Providers prior to inclusion in the program.

## B. FINANCIAL REQUIREMENTS

Because MSC invests in marketing and strategic support of each Affinity Provider's product/service, there are certain financial criteria that must be met in order to qualify for the program.

- **Payment:** MSC prefers compensation that provides on-going revenue based on the success of the program. This typically includes payment on the acquisition of new customers, and a percentage of sales, transaction volume, loan volume, etc.
- **Minimum Annual Revenue Guarantee:** In the event the annual compensation described above does not meet an annual threshold, MSC requires a minimum revenue guarantee of \$50,000 to offset MSC's cost of managing and marketing the program. While an annual guarantee is non-negotiable, NFIB will evaluate each potential Affinity Provider on its own merits, and may consider commitments to paid advertising as an equivalent guarantee.

## C. MARKETING REQUIREMENTS

Affinity Providers are expected to market their services directly to members (one of the many benefits of being an Affinity Provider is 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 Affinity Providers will take advantage of the available marketing channels. The most successful Affinity Providers utilize an integrated marketing plan to maximize their exposure to NFIB members.
- **Relationship Manager:** We request that each Affinity Provider identify an experienced relationship manager to serve as a primary liaison with the MSC staff. The relationship manager will oversee the implementation of the marketing plans as well as handle day-to-day contact with the MSC staff and also assist in troubleshooting any operational issues.
- **Marketing Resources:** Affinity Providers will need to provide marketing resources to develop advertising and content for inclusion in NFIB marketing channels. These marketing resources should 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. MSC staff will not write articles about your product or service, however; they will provide guidance on structure 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 each Affinity Provider is required to submit quarterly Performance and Revenue reports which detail key performance metrics.

## E. BENEFITS OF BECOMING A PROVIDER

Each accepted Affinity Provider company will be required to enter into two bifurcated agreements, outlined below.

1. **Program Agreement** – This agreement is between MSC and the participating company and includes the primary business and legal terms of the relationship.
2. **Royalty Agreement** – This is an agreement between NFIB and the participating company that allows the Affinity Provider to use the NFIB logo, service marks owned by NFIB and the membership list also owned by the 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





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

## A. INVITATION TO SUBMIT INFORMATION TO NFIB MSC

Prospective Affinity Providers who have not been invited to submit an RFI/RFP as part of the MSC process are required to submit the information requested below for further consideration. Please submit information in writing to [PartnershipInquiries@NFIB.org](mailto:PartnershipInquiries@NFIB.org)\*:

- How many small businesses are currently using the products and/or services being proposed as part of the Affinity Provider Program? If you are not currently selling to the small business market, please indicate why you believe the product or service would be beneficial to NFIB members.
- Please provide demographic information on the customers (e.g., employee size and annual sales distributions) and sales information (e.g., annual product/service sale by customer, average sale price per product).
- Will a unique offer or benefit be provided to NFIB members? If yes, what? (e.g., discounts, free trials, enhanced service, etc.)
- What sales and marketing channels will your company use to promote the NFIB program?
- Is your company willing to meet the minimum revenue guarantees and marketing commitments?
- Are there any geographic restrictions on selling your product and services? If yes, please list:

\*MSC reserves the right to cancel any review process and withdraw this document. By responding to Section 8 you acknowledge and agree that neither MSC nor NFIB makes any express or implied warranties, representations or guarantees concerning the subject matter of this document or which entity ultimately may be evaluated or chosen as an Affinity Provider. In no event will MSC, NFIB or any third party have any liability for any direct, indirect, special, punitive, consequential or any other damages (including lost profits) relating to the subject matter of this document or to which entity an evaluations may be undertaken. You further acknowledge and agree that you have the power and authority to submit all information on behalf of your entity.

## B. EVALUATION PROCESS

Once your information is received, NFIB MSC will begin the evaluation process to determine how to move forward. NFIB MSC follows a general process to ensure that we select the highest quality and viable offer for our members.

### The full process includes:

- 1 Evaluating member need(s) through surveys, requests and market research
- 2 Identifying additional potential providers that have experience with small business
- 3 Contacting potential providers to gauge their interest in the Affinity Provider Program
- 4 Inviting potential providers to participate in an RFI/RFP process. This process will provide additional data relevant to the opportunity and allow both the potential provider and NFIB MSC to fully evaluate the opportunity
- 5 Selecting a finalist(s) based on criteria stated in the RFP
- 6 Negotiating Affinity Provider agreements
- 7 Program Launch to NFIB members