

LAUNCH A ROUNDING PROGRAM

Checklist

1. DEFINE PROGRAM STRATEGY

- ☐ Set clear goals (e.g. fundraising, savings, engagement, etc.)
- ☐ Conduct customer discovery and understand your audience
- ☐ Map out a basic user flow and timeline
- ☐ Involve key internal stakeholders


2. BUILD & PREPARE FOR LAUNCH

- ☐ Research, vet and choose a rounding infrastructure vendor
- ☐ Choose and integrate with development approach (custom vs. turnkey)
- ☐ Conduct internal QA and user testing
- ☐ Prepare go-to-market asset and launch support

3. LAUNCH AND OPERATE

- ☐ Launch your rounding program!
- ☐ Monitor technical performance and edge cases
- ☐ Provider user support and troubleshoot early issues
- ☐ Promote across channels with clear CTAs

4. OPTIMIZE AND GROW

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- ☐ Track KPIs and goal alignment
 - ☐ Collect user feedback regularly
 - ☐ Identify drop-offs and friction points in the flow
 - ☐ Share updates with internal teams
 - ☐ Plan feature improvements or A/B tests
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